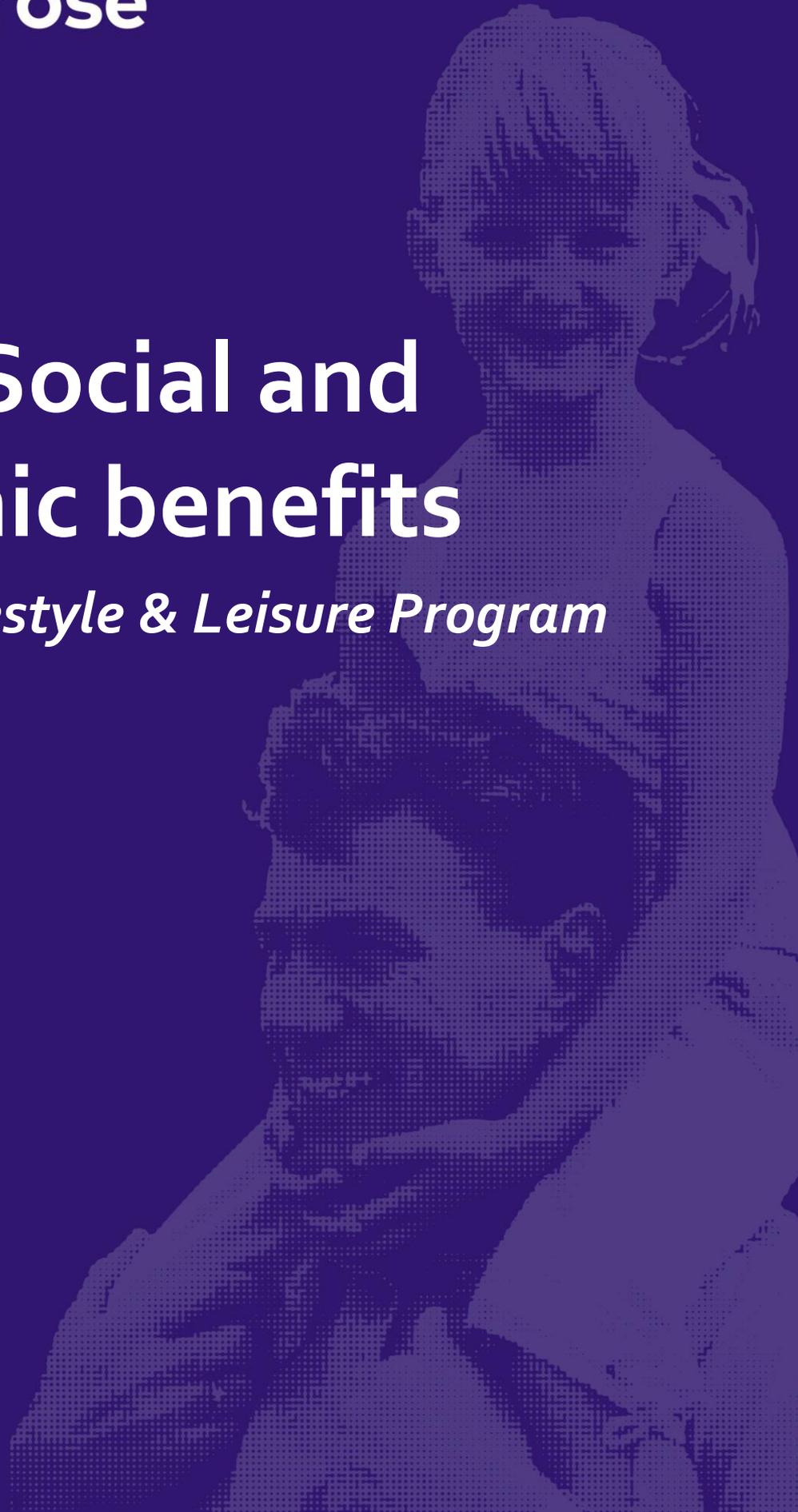




Study: Social and economic benefits

Montrose Lifestyle & Leisure Program

August 2016



Executive Summary

The Lifestyle & Leisure Program (LLP)

LLP is a community-based service for young adults between 18 to 35 years of age, who reside in the Brisbane area and is the first funded adult program at Montrose.

The program is open to young adults who are able to communicate, make their own decisions and are self-motivated. It provides physical support during group and individual programs that offer a stimulating environment of learning, exploration and development of friendships, interests as well as making links with relevant community organisations and services.



The intent of the study

The intent of this study is to gain an understanding of the social and economic values generated by LLP, which could be shared with stakeholders and ultimately used to improve program delivery. Specifically, there were five key objectives identified at the outset of the project:

1. Understand the range of outcomes generated by LLP for all material stakeholders. For this SROI study, material stakeholders include LLP customers, family & carers, Montrose and the Government (federal and state)
2. Identify appropriate indicators that will allow LLP to measure each of these outcomes
3. Understand the value of these outcomes, as well as the investment required to achieve them
4. Provide a clear enunciation of the impact and value of the program for stakeholders.
5. Provide insights and recommendations.

The outcomes of this project will be used to inform the future direction of the LLP, and support Montrose to improve the program.

Project approach

The methodology selected to deliver the objectives was Social Return on Investment (SROI). SROI is an internationally recognised methodology used to understand, measure and value the impact of a program or organisation. It is a form of cost-benefit analysis that examines the social, economic and environmental outcomes created and the costs of creating them.

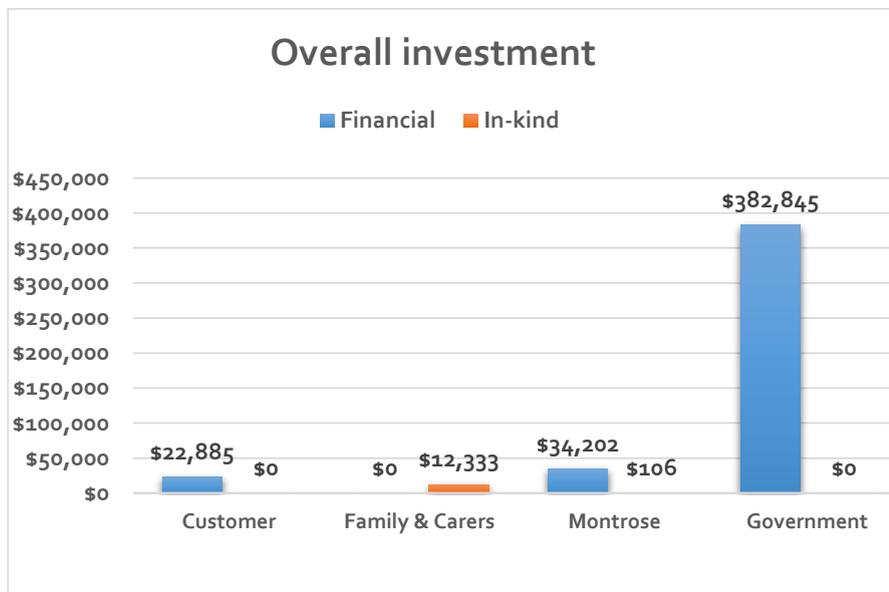
This SROI analysis is a baseline analysis that looks at the investment made, and the stakeholder outcomes experienced as a result of the LLP during the 2015 calendar year. In conducting this SROI analysis, the Researcher used a mixed method approach to interview and survey Customers, Family & Carer, Montrose and the community. Secondary research was also conducted to further understand and triangulate findings.

The total value created by the program represents the unique value created by LLP for stakeholders impacted by the program, attributable to the investment made in 2015. The short timeframe of the analysis and the paucity of data in some areas limits the extent to which some outcomes can be proven and may under-estimate the extent of some of the impacts.

Findings

The investment to LLP

A total of \$453,670 was invested into the LLP, of which \$441,231 was cash investment, and \$12,439 was for in-kind services. LLP is funded under 'Community Access', thus the majority of the investment comes from the Department of Communities, Child Safety and Disability Services (Queensland State Government).



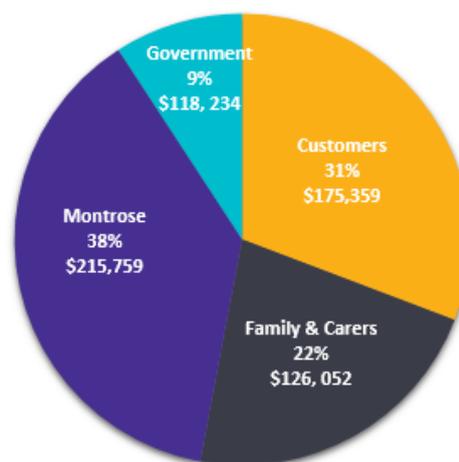
In the 2015 calendar year, LLP received \$397,306 in funding and grants. Financial records shows that the majority of this funding was used by Montrose in the delivery and operation of LLP. A remaining \$34K was then reinvested back into the LLP program. A number of contributions via community events and government grants were made to LLP in the 2015 calendar year.

The social and economic value created

Overall, LLP has generated significant social and economic outcomes for the customers it works with, as well for other stakeholders who are affected by the program. The achievement of these outcomes is reliant upon the valuable work that the program undertakes with customers throughout their participation with LLP.

The accompanying diagram, illustrates the largest value of LLP was generated by Montrose (38%) in establishing awareness of the program. Customers also experienced a significant level of social outcomes (31%) followed by Family & Carers, and the Government.

Social value creation breakdown by group



■ Customers ■ Family & Carers ■ Montrose ■ Government

When exploring the outcome by type, social outcomes accounted for 90.85% for the clustered group including customers, family & carers and Montrose. This is indication that LLP generates a significantly higher social outcome for all three groups. The government accounted for 9.15% of the economic dimensions through cost savings of mental support, medication, hospitalisation and transportation.

Value of outcome type



When the estimated \$1 001,476 in social value that was generated is compared with the \$453,670 investment, the SROI ratio equates to 2.2: 1.

Lifestyle & Leisure has delivered an SROI ratio of 2.2 : 1 based on the investment and operations of the 2015 calendar year

That is, for every \$1 invested, approximately \$2.21 of social and economic value is created

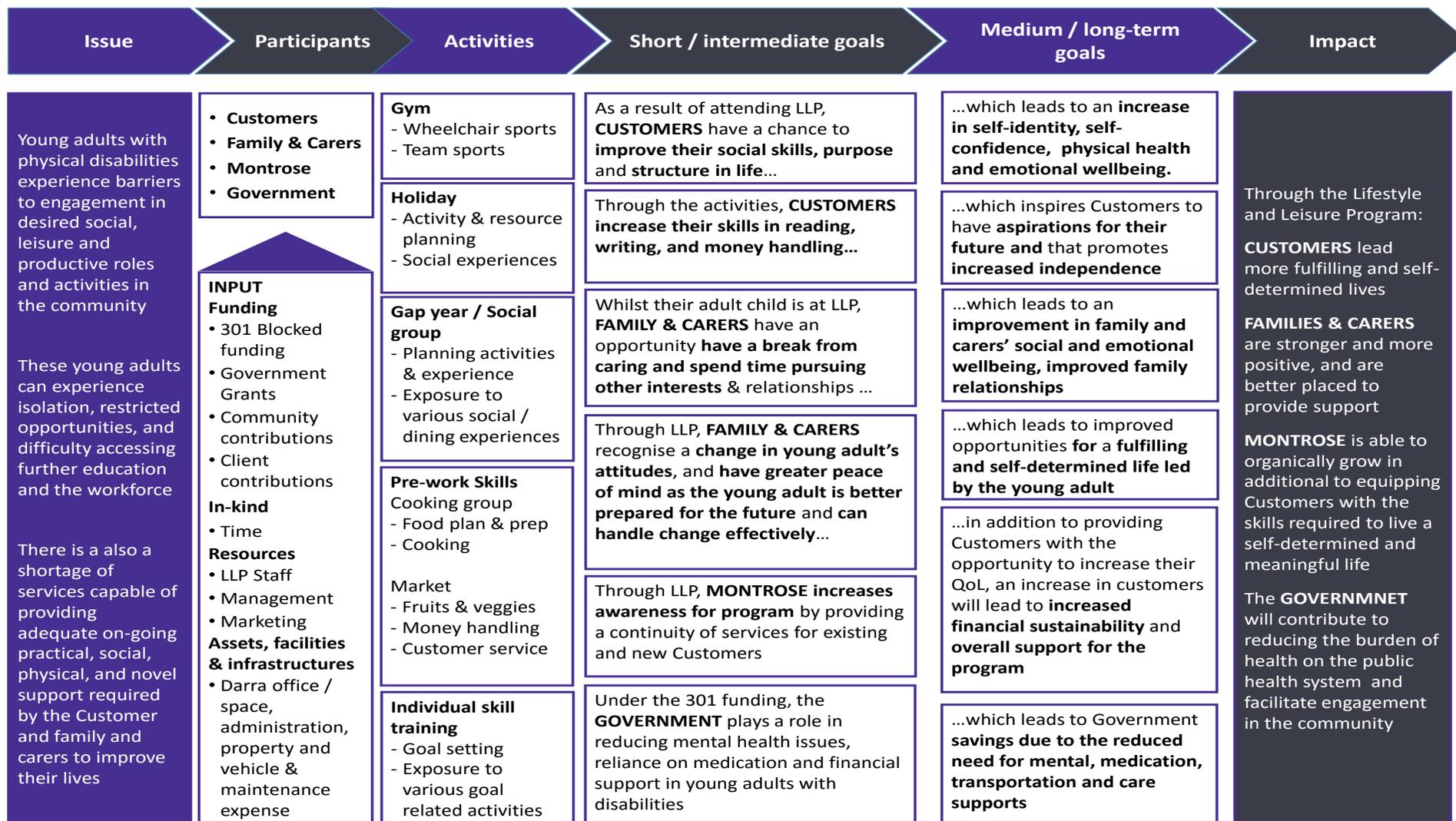
SROI ratio 2.2 : 1	=	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #00c0c0; color: white; padding: 5px; border-radius: 10px;">Present value of benefits = \$1, 001, 476.58</td> </tr> <tr> <td style="background-color: #ff9900; color: white; padding: 5px; border-radius: 10px;">Present value of investment = \$453, 670.16</td> </tr> </table>	Present value of benefits = \$1, 001, 476.58	Present value of investment = \$453, 670.16
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Sensitivity analysis and considerations

As with any financial modelling, it is expected that changes to underlying assumptions will result in changes to the SROI ratio. In the high and low scenarios tested in this sensitivity analysis, the SROI ratio remains in the range of 1.2:1 to 3.1:1 indicating that - even with highly conservative assumptions - social value created by LLP is likely to be in excess of the investment in those programs.

Lifestyle & Leisure logic and impact

The valuation is derived by first understanding the logic of LLP and then measuring and valuing the outcomes achieved by stakeholders from the investment in 2015. The following is a simplified representation of LLP program logic:



The impact of the Lifestyle & Leisure Program



Many young adults with physical disabilities experience barriers to engagement in desired social, leisure and productive roles and activities in the community due to isolation, restricted opportunities, and difficulty accessing further education and the workforce.

Through its diverse program, LLP supports customers to experience long-term changes across multiple life domains, empowering them to live a fulfilling, independent and self-determined life. These changes include increased skills in reading, writing and money handling, improved social skills, improved sense of purpose and structure in life, increased independence, developed sense of identity and belonging in a community, increased confidence, physical health and emotional wellbeing.

The changes experienced by customers have a direct knock-on effect on Family & Carers. The knowledge that their child / relative / partner is spending time in a meaningful way, and is being cared for in a safe environment reduces their anxiety for the customers' immediate well-being and provides a valuable period of respite. This plays a significant role in improving the family and carers' social and emotional wellbeing whilst strengthening family dynamics.

The Commonwealth and State Governments incur significant costs due to the support and resources provided to individuals with a disability. The activities and support provided by LLP translates into substantial savings for the public purse. Specifically, there are fewer Customers requiring the need for mental health support, medication associated with mental health, reduced need for hospital admissions and decreased cost of transportation support.

Finally, Montrose commitment to supporting customers through LLP results in significant benefits for the organisation and program. Through customers' engagement with LLP, their friends, family and their community will develop both an awareness and understanding of the program.

Additionally, activities such as veggies box, cake stall and social events involve community engagement, and collectively contributes to increase awareness and understanding of LLP and the Montrose brand.

Case study: Nathaniel

Nathaniel is in his early twenties and lives with his parents. He has a little brother and believes that it is important that he sets a "good example". He speaks quickly and often pauses before giving an insightful and articulate response. Nathaniel explains that he was born with Duchenne muscular dystrophy, a condition that causes his muscles to degenerate. He shares that "growing up was difficult with mum and dad not being able to speak and understand English well. They had to learn about my disability whilst working hard to provide for my family".

Due to his condition, Nathaniel has been attending Montrose since he was a little boy. He comments that he has "grown up with Montrose". He joined LLP when he was discharged from paediatric therapy. In addition to attending tertiary studies, Nathaniel also participates in the Gap Year and social events organised by LLP. For Nathaniel, independence and having a voice is imperative. He states, "it is important that I am independent. I don't want to always have to rely on mum and dad... I have a voice, and like everyone, I want to choose and decide what I want to do." Nathaniel expressed that the encouragement he has received from LLP has instilled the confidence, and self-belief in his ability to share his voice through public speaking.

Participation in social events has also opened him to opportunities for engagement and increased family experiences. Nathaniel shares, "the best thing about the social events, is that I can take my family there next time. I can then share the experience with them. I can show them places that we can all go to rather than feel limited by my disability. "

Reason for success

LLP's vision is to provide customers with a "community" whereby they are encouraged to try new social and independent experiences to encourage a more fulfilling and self-determined life. The evidence provided by this analysis attests that the program is achieving this goal and has helped to change and give meaning to many young adults. By consulting with those who have participated in the program over the last calendar year the program has been shown to have the capacity for significant long-term impact.

The customers that LLP works with are often highly marginalised with limited access to community and social engagements. Furthermore, there are an extremely limited number and variety of alternative lifestyle and leisure programs that is catered for this group. In this context the importance of the program's success is magnified.

LLP's success has been built upon the strategic and evidence based design of its program. Three critical elements of this design are:

- **A holistic model of care** – Customers experience changes across a spectrum of life domains. Through the provision of training in living and social skills, customers are facilitated with the opportunity to achieve their individual goals and plans. However, LLP recognises that their customers can experience an array of challenges. A factor that sets LLP apart from other organisations is that the program can leverage the available skills and expertise of other therapeutic and professional staff at Montrose. An example of this has been the collaboration with Montrose psychologists who provides training in working with internal processing and emotions. Progress in one area supports change in another, enabling customers to transform their own lives. This holistic model of care also means that the benefits of the program extend past the customers themselves, to also improve the lives of their Family & Carers.
- **An individualised approach** – LLP staff work with each customer to understand their specific needs and to help them set and progress towards achieving their own individual service plans and life goals. This approach empowers customers to take responsibility for their own lives as well as gives them the support and tools they need to do so. The program allows customers to progress at their own pace and understands that set-backs can occur. By maintaining faith in its customers, LLP instils customers with hope and helps them to realise their potential.
- **Experienced and dedicated staff** – The success of LLP is a strong reflection of the quality of its management and staff. Interviews with customers and Family & Carers consistently highlighted the dedication and professionalism of the program's staff as one of its core strengths. Examples were abundant of staff performing over and above their duties to provide innovative solutions to accommodate to customers' physical and mobility circumstance. Investing in professional development is a key element of the program's commitment to continuous improvement. As a result, LLP has built a team that is highly experienced and possesses significant expertise of young adults with disabilities.

Insights and recommendations

Informed by the current study, internal and external data as well as policy and published literatures, the Researcher has included 26 recommendations. Recommendations relates to program growth and opportunities, definition, content, workforce and continuous improvements through evaluation and outcomes.