

Social Value Analysis

# **HOUSING EXECUTIVE SOCIAL ENTERPRISE PLUS STRATEGY 2020-2024**

Undertaken by

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## WHO WE ARE



Rose Regeneration is a leading rural and coastal evaluation firm with nearly 20 years of experience supporting voluntary and community organizations, as well as funding bodies. Founded by Ivan Annibal, the business is known for its deep expertise in driving impactful change. This report has been crafted by Conor McGale, our Evaluation and Impact Manager in collaboration with Ivan Annibal.

## OUR PARTNERS



The Housing Executive is Northern Ireland's Strategic Housing Authority and a major landlord. Established under the Housing Executive Act (NI) 1971, we are a non-departmental public body governed by a 10-member Board and supported by a Chief Executive and Executive Team. We are a professional housing organisation, committed to fairness and improving lives through effective housing solutions. Our vision is that everyone should have access to an affordable, sustainable, and suitable home in a safe, attractive, and climate-resilient place. Guided by our values of fairness, passion, and expertise, we address inequality and tackle climate challenges through housing.



# BACKGROUND

Rose Regeneration were commissioned to carry out a Social Return of Investment Evaluation of the Housing Executive's Social Enterprise Plus Strategy for the period of 2020-2024.

The aim of this research was to provide an evaluation of the impact of the Social Enterprise Plus Programme (2020-2024), which will demonstrate both the financial and non-financial impacts including its Social Return on Investment (SROI). It will also provide evidence to inform the design and implementation of the new Social Enterprise strategy.

The Social Enterprise Plus Strategy 2020-2024 focused on continuing to expand work related to supporting social enterprises, with an emphasis on developing individuals, strengthening communities and maximizing partnership working. The Housing Executive's approach has provided an avenue to improve life chances via the creation of community owned social enterprises and training opportunities within and for the benefit of Housing Executive communities.

This analysis had 3 objectives: -

1. To evaluate and review the outputs and outcomes from the Social Enterprise Plus programme 2020-2024, including an SROI evaluation.
2. To engage with stakeholders and beneficiaries in measuring the social value and impact of the Social Enterprise Plus programme.
3. To provide evidence to inform the design and implementation of the new social enterprise/ social investment strategy.

This analysis was completed by working closely with Housing Executive staff, carrying out desk research of available monitoring information, arranging interviews of a sample of organisations that received support from the scheme, and using the Social Value Engine (<https://socialvalueengine.com/>), an online measurement tool which has assisted over 100 organisations and projects across the island of Ireland to determine the impact of the work they do.



**How they approached their work and what they have done up to now has been excellent. Really supportive and key to our work. Its an investment in the communities, and the cohesion in communities. Investment in our project was an investment in this area. Funding approach should be commended.**

# EXECUTIVE SUMMARY

Rose Regeneration has carried out a Social Value analysis of the Housing Executive's Social Enterprise Plus Strategy for the period of 2020-2024.

The analysis found that Housing Executive Social Enterprise Plus Strategy and Programme delivered a **Social Return of Investment (SROI) of £5.09 for every £1 invested.**

This reflects a very high Value for Money Ratio as stated within the Ministry of Housing, Communities & Local Government in England's Appraisal Guide (2025).

The programme demonstrated clear positive social impacts in a number of ways.

This includes:

- New jobs (both full-time and part-time) being created.
- New jobs (both full time and part time) being supported.
- New social enterprises being created.
- Additional employment opportunities arising as a result of investment.
- People availing of a range of training opportunities to assist them in securing employment.
- Housing Executive tenants benefiting as a result of the investment made in local areas

The programme also delivered a number of significant impacts when measured against the UN Sustainable Development Goals.

These include:

- Decent Work & Economic Growth
- Industry, Innovation & Infrastructure
- Sustainable Cities and Communities
- Peace, Justice & Strong Institutions
- Partnerships for the Goals



**I would definitely say that without a doubt, the fact that our social enterprise is able to support our training and employability programme for young people, which I would say 90% are probably housing executive tenants in the area that we would work. If we didn't have that initial support from Housing Executive to be able to do that and then keep growing and developing how we have, we definitely would not be seeing the outcomes and the benefits to this community and to the young people in the area as well.**

# INTRODUCTION

The Housing Executive are the Strategic Housing Authority for Northern Ireland and a landlord at scale. It is a non-departmental public body, established by the Housing Executive Act (NI) 1971 (since superseded by the Housing (Northern Ireland) Order 1981).

The Housing Executive's four-year Social Enterprise Plus Strategy was launched in 2020 with three main objectives: strengthening Housing Executive Communities; improving the economic circumstances of customers and working in partnership with others for the benefit of Housing Executive communities. The aim of the strategy was to invest in social enterprise within Housing Executive communities using available assets including:

- Financial investment awards (approximately £200,000 per annum in total)
- Use of assets (i.e. land and property; commercial lets)
- OCN qualifications in social enterprise
- Facilitation of best practice visits
- Using Social Value as a method to create growth within the social enterprise sector

The Housing Executive is about to embark on a new strategy for supporting Social Enterprises. Part of this research's remit was to help gather information and evidence from stakeholders supported by the previous strategy, to ascertain key areas that this new phase of work should focus on.

The objectives of the research were:

1. **To evaluate and review the outputs and outcomes from the Social Enterprise Plus programme 2020-2024, including an SROI evaluation.**
2. **To engage with stakeholders and beneficiaries in measuring the social value and impact of the Social Enterprise Plus programme.**
3. **To provide evidence to inform the design and implementation of the new social enterprise/ social investment strategy.**



**We really value the Housing Executive support that our organisation have received and we have recommended what they do to many other social enterprises. They have been extremely helpful in the support they provide as well as the learning from networking with others.**



# ANALYSIS

This report outlines findings arising from reviewing of data captured by each of the organisations funded under the programme, discussions that have taken place with the Housing Executive project team and interviews that have taken place with a number of funded organisations.



**In terms of the new strategy proposed by Housing Executive - all of the proposals are welcome particularly around well-being economy, circular economy, Green Agenda, Social Value Partnerships, Access to Jobs and Apprenticeships.**

## Objective 1

**To evaluate and review the outputs and outcomes from the Social Enterprise Plus programme 2020-2024, including an SROI evaluation.**

We have carried out an SROI analysis of all the project data captured on the programme and have made deflator recommendations based on the discussions that we have had with a number of organisations who have received funding and have taken part in the programme.

This has been done by using the Social Value Engine <https://socialvalueengine.com/> which has been developed by Rose Regeneration and is only one of a handful of Social Return of Investment tools accredited by Social Value International. To date it has been used by over 100 projects and funders within the island of Ireland, and over 400 throughout the UK. The SVE provides:

- A systemised and academically robust assessment of social value to forecast, plan and evaluate activities.
- Nearly 600 peer-reviewed financial valuations/ proxies derived from reliable sources and tagged against several widely recognised evaluation frameworks
- A description of how a project or activity creates value and a ratio that states how much social value (in £) is created for every £1 of investment.
- Information about how activities are making a place better to live in – by tagging outcomes and financial proxies against one of the seventeen aims of the United Nations Sustainable Development Goals (SDG's).



# OUR METHODOLOGY

Rose Regeneration has worked with the Housing Executive Social Enterprise team to identify the social and economic values which can be applied to their work.



**Housing Executive have been a fantastic support actually putting the investment into communities gives the opportunities for communities to deliver on community need, local job creation. A little investment in our communities will be life changing with the outcomes this delivers.**

This has been undertaken using a Social Return on Investment (SROI) methodology which the Social Value Engine is based on.

For the project, the approach to analysis involved:

1. Discussion with Housing Executive staff involved in the strategy delivery and project monitoring.
2. Analysis of available monitoring information (i.e. Project Data, Survey Consultation responses, Grant Breakdown etc).
3. Identifying the outcomes achieved by the strategy over a particular time period.
4. Assigning a gross £ value to each of these outcomes, using the range of nearly 400 valuations/proxies contained within the Engine.
5. Via interviews with a number of organisations who received funding/support and staff conversations, applying a series of 'deflators' to produce a net £ value:
  - **Leakage:** How much of an outcome might have delivered an impact outside of the area that the strategy originally intended.
  - **Deadweight:** How much of the outcome might have been achieved without the strategy's intervention.

- **Attribution:** What proportion of an individual's outcome might be attributed to others because their activity contributed to it.
- **Drop-Off:** What proportion of the outcome will diminish over time.
- **Displacement:** How much of the outcome has displaced other outcomes.

6. Calculating the input costs – i.e. the total amount of funding given to all groups under the Housing Executive Social Enterprise strategy from 2020-24 plus associated delivery costs
7. Producing a Social Value figure for the project by dividing the net value of the outcomes by the input costs.

This approach is based on the methodology (and the accreditation it has been assessed against) contained within the HM Treasury Green Book.

Additionally, this analysis has focused on how the outcomes generated from the Housing Executive Social Enterprise strategy relate to the local place, a sustainable community where people want to live, work, and invest. To do this, our approach involves relating each of the organisation's impacts to improvements in the sustainability of local areas.

# SROI ANALYSIS

We do this by cross referencing each of the proxies/valuations within the Engine into the 17 themes of the Sustainable Development Goals. This approach enables us, not just to offer a financial Social Value of this work, but to set out the contribution that it has made to the relative sustainability of the area where the organisation operates in and are based.

This approach is particularly powerful in supporting a narrative element to SROI reporting

which brings a local context to the Social Value process to accompany a financial value.

The table below sets out the financial valuations/ proxies that we believe are a good fit for the overall outcomes of the Housing Executive Social Enterprise Plus Strategy, the data being collected by the programme to date and the deflation assumptions that we have made which are used to ascribe an annual value to each of the outcomes.

Leakage (L) / Attribution (At) / Deadweight (DWT) / Displacement (DISP) / Drop Off (DOFF)

OUTCOME	VALUATION/PROXY	QUANTITY	YEARS OF IMPACT	UNIT	LEAKAGE (%)	ATTRIBUTION (%)	DEADWEIGHT (%)	DISPLACEMENT (%)	DROP-OFF (%)	IMPACT £
New Posts Created as a result of the Enterprise/Investment	Employment gained - average increase in income	41 Jobs Created	1	£20,988	0	15	15	0	15	£621,717.03
Additional Employment Opportunities Created	Employment Incentive costs	55 Posts	1	£3,560	0	20	20	0	10	£125,312.00
Posts supported as a result of the Enterprise Investment	GVA-Public Administration	43 Posts	1	£0.60p for every £1 invested	0	0	0	0	0	£432,600.00
People attending non-accredited training	Value of undertaking a part time course for work	527 Participants	1	£3105	0	30	30	0	30	£801,804.15
People attending accredited training & learning hours associated with it	Adult learning course enabling someone to progress in work or in a career	2380 Learning Hours	1	£75	0	15	15	0	15	£128,966.25
New Social Enterprises Created	Average cost of starting a micro-business	21 Organisations	1	£22,756	0	15	15	0	15	£345,265.41
Growth of existing Social Enterprise supported	Innovation support (voucher scheme)	45 Organisations	1	£6,584	0	10	10	0	10	£239,986.80
Volunteer Hours contributed to the Social Enterprise	Value placed by a local authority on volunteering	5702 Volunteer Hours	1	£15	0	20	20	0	20	£54,739.20
Housing Executive Residents that benefited as a result of the Investment	Value of Participatory Engagement	3096 Participants	1	£400	0	20	20	0	20	£792,576.00
Partnerships Created as a result of Housing Executive investment	Cost of inefficient collaboration	28 organisations	1	£9180	0	10	10	0	20	£208,202.40
Total										£3,751,169.24

# SROI ANALYSIS

The Source for each of the financial valuations/proxies used in this analysis (all drawn from peer reviewed and independently published secondary sources) is set out below:

PROXY	SOURCE
New Posts Created as a result of the Enterprise/Investment	<a href="https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/datasets/realtimeinformationstatisticsreferencetableseasonallyadjusted">https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/datasets/realtimeinformationstatisticsreferencetableseasonallyadjusted</a>
Additional Employment Opportunities Created	<a href="https://www.perkbox.com/uk/resources/library/employee-financial-wellbeing-guide">https://www.perkbox.com/uk/resources/library/employee-financial-wellbeing-guide</a>
Posts supported as a result of the Enterprise/Investment	<a href="https://www.gov.scot/publications/input-output-latest/">https://www.gov.scot/publications/input-output-latest/</a>
People attending non-accredited training	<a href="https://www.gov.uk/government/publications/labour-market-value-of-higher-and-further-education-qualifications-a-summary-report/labour-market-value-of-higher-and-further-education-qualifications-a-summary-report">https://www.gov.uk/government/publications/labour-market-value-of-higher-and-further-education-qualifications-a-summary-report/labour-market-value-of-higher-and-further-education-qualifications-a-summary-report</a>
People attending accredited training & learning hours associated with it	<a href="https://www.ptp.co.uk/training-courses/personal-development-training/">https://www.ptp.co.uk/training-courses/personal-development-training/</a>
New Social Enterprises Created	<a href="https://www.capitalontap.com/en/guides/posts/how-much-does-it-cost-to-start-a-business/">https://www.capitalontap.com/en/guides/posts/how-much-does-it-cost-to-start-a-business/</a>
Growth of existing Social Enterprise supported	<a href="https://apply-for-innovation-funding.service.gov.uk/competition/2057/overview/94b01162-f7ac-45b1-aede-ce7663a3be3a#:~:text=UK%20registered%20organisations%20can%20apply,of%20UK%20Research%20and%20Innovation.">https://apply-for-innovation-funding.service.gov.uk/competition/2057/overview/94b01162-f7ac-45b1-aede-ce7663a3be3a#:~:text=UK%20registered%20organisations%20can%20apply,of%20UK%20Research%20and%20Innovation.</a>
Volunteer Hours contributed to the Social Enterprise	<a href="https://www.powertochange.org.uk/wp-content/uploads/2020/06/Value_of_Volunteering_Working_Paper_Final.pdf">https://www.powertochange.org.uk/wp-content/uploads/2020/06/Value_of_Volunteering_Working_Paper_Final.pdf</a>
Housing Executive Residents that benefited as a result of the Investment	<a href="https://www.local.gov.uk/topics/devolution/devolution-online-hub/public-service-reform-tools/engaging-citizens-devolution-5">https://www.local.gov.uk/topics/devolution/devolution-online-hub/public-service-reform-tools/engaging-citizens-devolution-5</a>
Partnerships Created as a result of Housing Executive investment	<a href="https://www.talk-business.co.uk/2017/06/20/inefficient-communications-and-collaboration-costs-uk-companies-8000-per-employee-per-year/">https://www.talk-business.co.uk/2017/06/20/inefficient-communications-and-collaboration-costs-uk-companies-8000-per-employee-per-year/</a>



This funding supported the sustainability of services during a particularly difficult time. It was invaluable.



# SROI ANALYSIS

As stipulated previously, all of the outcomes achieved by the Social Enterprise strategy are linked back to one of the 17 UN Sustainable Development goals.

The table below outlines the total value of the activities carried out by groups funded under the strategy’s impact against several of the SDG’s.

UN SDG IMPACT AREA	£
Decent Work and Economic Growth	£2,023,064.84
Industry, Innovation and Infrastructure	£239,986.80
Sustainable Cities and Communities	£54,739.20
Peace, Justice and Strong Institutions	£1,225,176.00
Partnerships for the Goals	£208,202.40
Total	£3,751,169.24

The table below outlines the total value of the strategy’s outcomes, along with the costs to deliver this work.

ACTIVITIES VALUE	£
Project Benefits (Impact figure minus 3.5% discount)	£3,624,318.11
Costs of Project Delivery	£712,000
Social Value SROI	£5.09 for every £1 spent

We have assessed these results for sensitivity and materiality. In terms of materiality, it is clear from our discussions with organisations involved in the programme and the responses from all projects that participated, that there is a good justification for including all these proxies including those that may appear to have smaller values than others. Many of these activities were key deliverables for the programme and the projects that it supported, therefore participants place a high value on them.

The highest SDG impact area that the programme achieved was on “Decent Work and Economic Growth,” with the lowest being “Sustainable Cities and Communities.” Whilst there is a substantial difference between both (despite the latter still having a significant impact), we nonetheless feel inclusion is justified as a number of the respondents in our interviews put a significant emphasis on these factors.

**BY GOING THROUGH THIS PROCESS, THE HOUSING EXECUTIVE SOCIAL ENTERPRISE STRATEGY IS DEMONSTRATING AN IMPRESSIVE SOCIAL VALUE OF £5.09 FOR EVERY £1 SPENT. THIS DEMONSTRATES A VERY CREDIBLE LEVEL OF ACHIEVEMENT ON ITS PART.**

# SROI ANALYSIS

In terms of this figure, it is worth noting that the Ministry of Housing, Communities & Local Government in England have updated their Appraisal Guide (2025) which is used by government departments and local authorities have robust evidence on value for money when making policy and investment decisions. <https://www.gov.uk/government/publications/the-mhclg-appraisal-guide>

In the guide, it provides information and guidance for Departments in outlining what funded projects are seen as a good “value

VFM CATEGORY	IMPLIED BY...
Very High	BCR greater than or equal to 4
High	BCR greater than or equal to 2 and less than 4
Medium	BCR greater than or equal to 1.5 and less than 2
Acceptable	BCR greater than or equal to 1 and less than 1.5
Poor	BCR greater than or equal to 0 and less than 1
Very Poor	BCR below 0

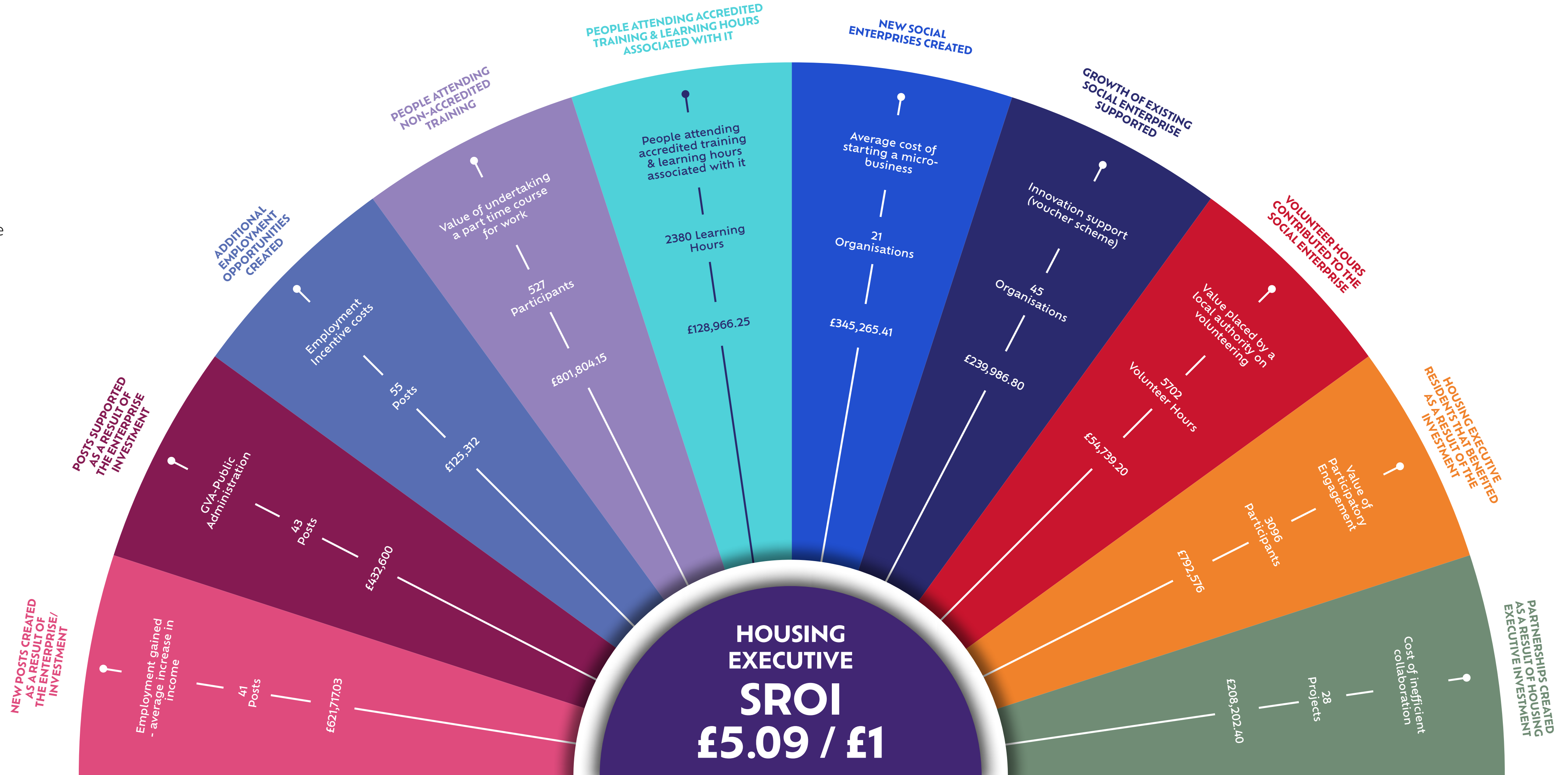
“

In summary anything over a value of £4 would be demonstrating a very high value for money return on any potential investment. So, the work that the Housing Executive Social Enterprise Strategy carries out would be clearly demonstrating that.

The support given to us by Housing Executive and this funding has allowed people in our local area to access a service that they can help shape and serve their needs. The services are very participant led, helping people learn life skills in a practical way. And we have found that people are increasing their time with us, because of the resource that Housing Executive assisted us in developing.

# IMPACT MAP

The overall impact of the Housing Executive Social Enterprise Plus Strategy can be illustrated in the Impact Map opposite.





# CASE STUDY 1

## PORTADOWN WELLNESS CENTRE South Region

**Our model of combining emotional support with practical activities is proving very successful and effective and our organisation is committed to providing good practices promoting equality and good relations. Our relationship with the Housing Executive's Social Enterprise Team has been invaluable and their help has been an important part of our growth.**

Alan McDowell, Director

Portadown Wellness Support Centre was established to provide support and empowerment for those experiencing mental ill health, addiction, loneliness, isolation, or physical illness. As part of the organisation, they also operate a social enterprise garden centre and coffee shop. The enterprise supports residents of the community experiencing loneliness, isolation, or mental health issues, helping them to recover and build self-confidence, self-belief, and self-esteem.



A £10,000 grant as part of the Social Enterprise Plus Programme was used to purchase equipment to establish a community coffee shop to provide a safe and warm environment where people in the community experiencing loneliness and isolation can visit and enjoy an affordable cup of coffee or hot meal and meet new, caring, encouraging and supportive friends.

The support and grant for this project will undoubtedly enhance the self-esteem and self-confidence of all local Housing Executive communities who use the services at the Garden Centre. Profits are reinvested into the wide range of mental health services provided by the organisation.



# CASE STUDY 2

## BLACKMOUNTAIN SHARED SPACE Belfast Region

The Black Mountain Shared Space Project (BMSSP) is a community led project that aims to create a welcoming, safe and accessible state-of-the-art building on land between Ballygomartin Road and Springfield Road. The project works to improve both intra-community well-being and cross-community relationships in the Upper Springfield Road/Upper Shankill interface area of West Belfast through the process of development and delivery of a “shared space”.

**It has been fantastic to see all the hard work pay off, the new centre is bringing people together, building relationships, encouraging social inclusion and personal growth, the help of all our partners including the Housing Executive Social Enterprise Plus Team has been invaluable.**

Seamus Corr, Project Manager



The grant enabled the organisation to employ a part-time Social Enterprise and Social Inclusion Officer and to develop a new social enterprise within BMSS aimed at generating income, engaging diverse communities, and reaching underrepresented participants.

Impact: Support from the Social Enterprise Plus programme contributed to the successful establishment of this enterprise, helping BMSS to broaden its reach and create a more sustainable funding model.



# CASE STUDY 3

## TRIAx North Region

TRIAx are committed to serving the community. The Triax neighbourhood management team are an organisation that have evolved out of 24 years of community development work in the Bogside, Brandywell, Creggan, Fountain and Bishop Street areas. Triax provide a wide range of community services. In recent times they have increased their social enterprise activity by investing in two coffee vans.

As part of the Social Enterprise Plus Programme a £10,000 grant was used to purchase a fully functioning Coffee Cart.

This is an exciting new social enterprise project aimed at generating training and employment opportunities for the local community, offering on-the-job training and employment.

**We love the additional coffee cart that is mobile and has created a range of new employment and training opportunities for the people whom we have trained in Barista, the coffee carts are an amazing addition to our social enterprises. The help, assistance and support from the Housing Executive Social Enterprise Team has been invaluable.**

Elisha McCallion, Project Manager





# QUALITY ASSURANCE

We have considered materiality and sensitivity as part of this analysis. All the outcomes chosen make both a reasonable contribution to the overall total value (i.e., none is disproportionately large or small) and we have good third party (i.e., by the supported organisations themselves) validation of their materiality.

As part of the Social Value process, the final calculation stage undergoes rigorous scrutiny to ensure that each project is not “overclaiming.” When calculating deflator percentages, not only do we take into consideration the data captured/survey responses/evaluation information we receive, but we also benchmark these figures with

other similar social value analysis that we have carried out over the last number of years.

This is done by several members within the Rose Regeneration consultant team not directly involved with the analysis and involves a detailed “deep dive” into the data capture to ensure that there is no double counting. It also ensures that the deflator percentages are accurate in terms of the nature of the activity being carried out, the age/gender of the project participants, and the duration of the activity.

This rigorous approach ensures that a robust and accurate Social Value figure for the projects we analyse are appropriately calculated.

Furthermore, the Social Value Engine has internal safeguards which ensure that project values are not over inflated, double counted, and unrealistic. Using a “traffic light” system when an overall figure may be seen as overly high, the Engine will flag this immediately enabling the user to review all the data inputted to ensure consistency. Again, this adds another layer of scrutiny and robustness to the overall final figures.





# FINDINGS

## Objective 2

### To engage with stakeholders and beneficiaries in measuring the social value and impact of the Social Enterprise Plus programme.

To ascertain the impact of the Housing Executive Social Enterprise Strategy & Funding, the project team spoke to a number of organisations that were supported and funded from 2020-24.

The purpose of these conversations was twofold; - to allow organisations to explain the work they do, and to determine the importance/ value of the Housing Executive Social Enterprise support that each group received. This, and the review of all of the funded projects monitoring and evaluation data supplied, was the basis for our judgements on the deflators set out previously.

Opposite we set out some of the insights arising from a qualitative perspective from these

- **Support Provided:** Every organisation that we spoke to was effusive in their praise of the Housing Executive Social Enterprise Team and how they have supported them throughout all phases of their development. This ranged from assistance during the application process, facilitating best practice visits with well-established Social Enterprises, signposting organisations to other sources of help and advice, and to be a “sounding board” for the organisation. Some organisations mentioned that the team was particularly helpful in making introductions to Housing Executive sub-contractors in an attempt for organisations to partner up in delivering work i.e. maintenance and helping meet potential Social Value requirements for contracts. This was an area of work that many of the organisations believe should be a bigger focus in the next phase of the strategy, though some also indicated that this stage is most likely too soon for their own specific development.
- **Relationship Building:** It was clear that many organisations have a long-standing involvement

with Housing Executive on Social Enterprise (normally stemming from other partnership or community cohesion work) and that has led to a deeper understanding where both organisations have come from as well as Housing Executive being able to witness first-hand how various enterprises have developed and grown.

- **Importance of Funding:** All organisations we spoke to highlighted how vital the Housing Executive funding they received were to their development and success. Many mentioned that funding for social enterprises is not readily available in Northern Ireland and that the investment made by Housing Executive has been crucial for their own growth and sustainability. Organisations also outlined that initial Housing Executive funding they received has now enabled them to move from a “grant” dependent financial model and that many are now starting to see how the trading income is helping to sustain posts, deliver vital services within local communities and to Housing Executive tenants and place organisations on

# FINDINGS



a more sustainable financial footing. Many gave examples as to how their enterprise has expanded and moved into other services such as catering, training, maintenance etc.

- **Range of Organisations availing of Support:** There are a wide range of organisations being assisted under the programme: Childcare, Young People, Health & Wellbeing, Hospitality, Recycling of equipment, Arts & Culture, Tourism, People with Learning Disabilities, Mental Health etc.
- **Flexibility of Funding:** There was a wide range of uses that the funding was used for by the organisations. Examples provided were salary costs, capital & equipment costs, development and expansion of new enterprises & products, improving efficiencies etc. Organisations praised this approach particularly with the difficulties many of them faced both during the COVID-19 pandemic and the subsequent Cost of Living crisis.
- **Long term Impact:** Many of the organisations remarked that because they have received funding, it has had a long-term impact on them and the areas within which they are based. Many cited the example that they are still operational and showing a surplus as a result of the Housing Executive investment.

One organisation remarked that as a result of the support, their earned income has risen from 10% to 50% of their total income and has placed them on a more secure financial footing. Others stated that by being able to convert or use what was once unused space, it has completely regenerated that area with the enterprise being a community focal point for much activity. Other organisations have called the impact “transformative” and had enabled the future proofing of many of their services. Some remarked how it has turned them into a significant local employer also which has had a substantial impact on the local area.

- **Importance of Support for Development/ Growth:** Many organisations stated that without the funding, they would have had great difficulty attracting other necessary funding to kick start the idea. Many stated that they may have not been able to get their project off the ground, or that it would not have had the growth and rate of expansion as it has done because of Housing Executive funding. The importance of being able to secure match funding from other sources, as a result of securing Housing Executive investment was critical. When organisations were asked if other funding sources would come into play in the absence of the Housing Executive support, alternatives like loans would

have reduced their particular impact locally and increased the financial strain on them.

- **Training and Employment:** Many groups praised the funding also on its focus on training people and helping them provide job opportunities to local communities. Examples that were highlighted included the offering of qualifications and skills development, in a range of areas including food hygiene, customer care, childcare etc.
- **Social Value and Partnerships:** Many groups indicated their awareness and interest of potential Social Value partnerships as a result of this work. A number of them have had positive experiences with contractors as a result of introductions made by the Housing Executive staff, and their support in helping them with this was highlighted. This is an emerging area of work that is dependent on the individual stage of development that the group is at, but all recognise that there is more work to be done in identifying appropriate partners to work with.



# FINDINGS

## Objective 3

### To provide evidence to inform the design and implementation of the new social enterprise/ social investment strategy.

As part of the discussions with the supported organisations, we asked them about some of the challenges that their social enterprise had encountered to date, as well as exploring what they felt the new proposed strategy should do to help other similar organisations.

As before, we have set out the key emerging themes that came from these discussions.



- **Funding Continuation:** All organisations emphasised the need for this funding to continue as part of the strategy going forward. There were a number of viewpoints expressed as to what stage of the Social Enterprises' development is the funding most needed and more helpful. Some expressed the wish that it was vital to be funded from the start to help groups be "kick-started." Others mentioned that it may be 2-3 years after getting started that the funding is particularly needed in terms of new equipment/maintenance, systemising processes i.e. invoicing, employing a dedicated Business Manager, equipment to increase production etc.
- **Funding Levels:** Whilst all organisations we spoke to stress the importance of the funding continuing, they also emphasised the need for additional funding under the scheme including potentially offering larger grants for social enterprises and core funding support. A range of funding approaches were suggested by those we spoke to, including proposals for up to £20,000 per social enterprise made each

year and reinstating higher levels of support for groups (up to £50,000.). Also, it was suggested that a "pilot funding scheme" of up to £10,000 could be introduced to allow communities to experiment with social enterprise models within their locality. Many organisations reiterated the point that increased investment in the scheme would bring even more impact and allow a wider range of groups and areas in NI to take advantage.

- **Multi-Year Funding:** Some organisations indicated that the funding should be delivered on a multi-year basis, allowing them to apply for 2-3 years funding as opposed to annual funding. Many believed that 12 months funding is not ideal in terms of helping their organisation plan for the long-term future. The suggested new levels of funding within a proposed new strategy were welcomed but equally, the flexibility around grant levels was also highlighted as something many would like to see.



# FINDINGS

- **Funding Type:** In terms of funding types, many indicated the need for funding to support capital i.e. equipment, maintenance costs etc while others felt that funding should be specifically for supporting salaries. Others indicated that funding should be available to go towards essential overheads (heating & lighting, insurance, energy efficiency etc). The increased cost of electricity during the cost-of-living crisis was specifically mentioned as a challenge for many, and that funding could have been made available to help meet this.
- **Demonstrate Sustainability:** Finally, around funding, some organisations stated that each applicant for funding should have a clear focus and business plan as to what they are doing. Many felt that initiatives must demonstrate sustainability beyond this funding so that groups are not reliant on Housing Executive funding each year.
- **New Set of Skills Required:** Some organisations mentioned that their enterprise has emerged from the community development work that they initially set out to do. And while they feel suitably skilled in community, they are not as confident when it comes to essential business skills. Some groups felt that if Housing

Executive could provide more support to them around this skills development specifically, it would be greatly beneficial.

- **Best Practice Visits:** All organisations expressed the view that the Best Practice visits are so important and inspirational. Many remarked specifically that the networking side that it allows is hugely valuable along with the sharing of advice and pitfalls to avoid. All agreed that this should be a key element of the strategy going forward.
- **Social Value Promotion:** A number of organisations felt that more promotional work could be done by Housing Executive about the Social Enterprises they have funded and to potentially set up a “brokerage” system of introducing them to private contractors in an attempt to help meet Social Value requirements and clauses. Also mentioned was the potential role that Housing Executive could play in monitoring this to ensure effective relationships are maintained. It was highlighted that Social Value and Clauses also benefit communities and Housing Executive tenants, and by focusing on this more it may encourage a more substantial number of organisations willing to work with Contractors.

It could also assist making private companies more aware of their own responsibilities when working in local areas.

- **Alignments with Government Departments:** A number of the larger social enterprises felt that there should be more alignment with the proposed Housing Executive Social Enterprise Strategy alongside the core function of NI Executive. The Department of Economy was particularly highlighted due to their own responsibility for Social Enterprises and the recent publication of their action plan to help support the sector. The new Programme for Government will also provide an opportunity for alignment.
- **Co-Design Approach:** 1-2 groups felt that the co-design approach of the strategy works to the benefit of Housing Executive tenants and has cross-cutting themes. Some spoke about what Housing Executive are trying to achieve when it comes to Social Enterprises: Are they trying to achieve better outcomes for their tenants through social enterprise or are they trying to create social enterprises that their tenants can benefit from. There is a subtlety in both and may be worth making this more specific and clearer within any potential new strategy.



# CONCLUSIONS



## Funding Support Key Highlights:

- **41 jobs created as a result of funding and support**
- **43 additional jobs supported**
- **21 new social enterprises created**
- **45 social enterprises helped to grow and be supported**
- **38 pieces of equipment purchased**
- **3096 Housing Executive tenants benefited from the investment**
- **238 accredited training opportunities availed of**
- **527 non-accredited training opportunities availed of**
- **5702 volunteer hours as a result of investment**

These achievements and the conversations that were had with a number of organisations clearly reflects the significant impact that the Housing Executive Social Enterprise Strategy has had working with multiple communities and organisations.

**Delivering £5.09 of Social Value for every £1 spent is a highly credible achievement and illustrates the high value for money that Housing Executive delivers in terms of its funding.** Given the ongoing budgetary challenges faced by the public sector and statutory agencies in Northern Ireland, this particular work and support

demonstrates clear positive social impacts in:

- Improving employment opportunities
- Increasing skills development for new employees and job-seekers
- Encouraging local communities and organisations to contribute to the local economy
- Helping social enterprises scale up and develop new products and services
- Giving value to the roles of volunteers within the field
- Creating partnerships between social enterprises and private companies.





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