

CAF Global Alliance

Creating social value

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About the Charities Aid Foundation (CAF)

Motivating society to give ever more effectively, helping to transform lives and communities around the world.

- Helping people and businesses support the causes they care about, through advocacy, advisory services and giving solutions.
- Providing charities with day-to-day banking and fundraising services, freeing them up to concentrate on the real work of making a difference.
- Globally, CAF works with over 280,000 individuals and 7,000 companies and manages over £3 billion for donors and non-profits, supporting 50,000 non-profit organisations in 100 countries.
- As a charity, making an impact in the charitable sector is what drives us. That's why we advocate for an enabling environment for civil society and philanthropy.

CAF Global Alliance



- CAF has been working globally for over 20 years. We have an established presence in Brazil, Russia, India and South Africa, as well as in the world's strongest philanthropy markets – UK and North America.
- We work to catalyse philanthropy in emerging markets and grow cross-border giving
- Our interest in social value creation and social impact measurement is to
 - understand our impact to inform our strategic planning (to prove + improve + maximise resources)
 - strengthen practice in our sector through social impact measurement for donors and NGOs

Key decisions

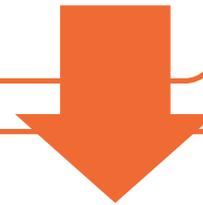
Conceptual approach

- Focus on social value creation (change management)
- Measurement based on principles of social return on investment (SROI)



Applied to our global strategy

- Theory of change
- Social impact framework

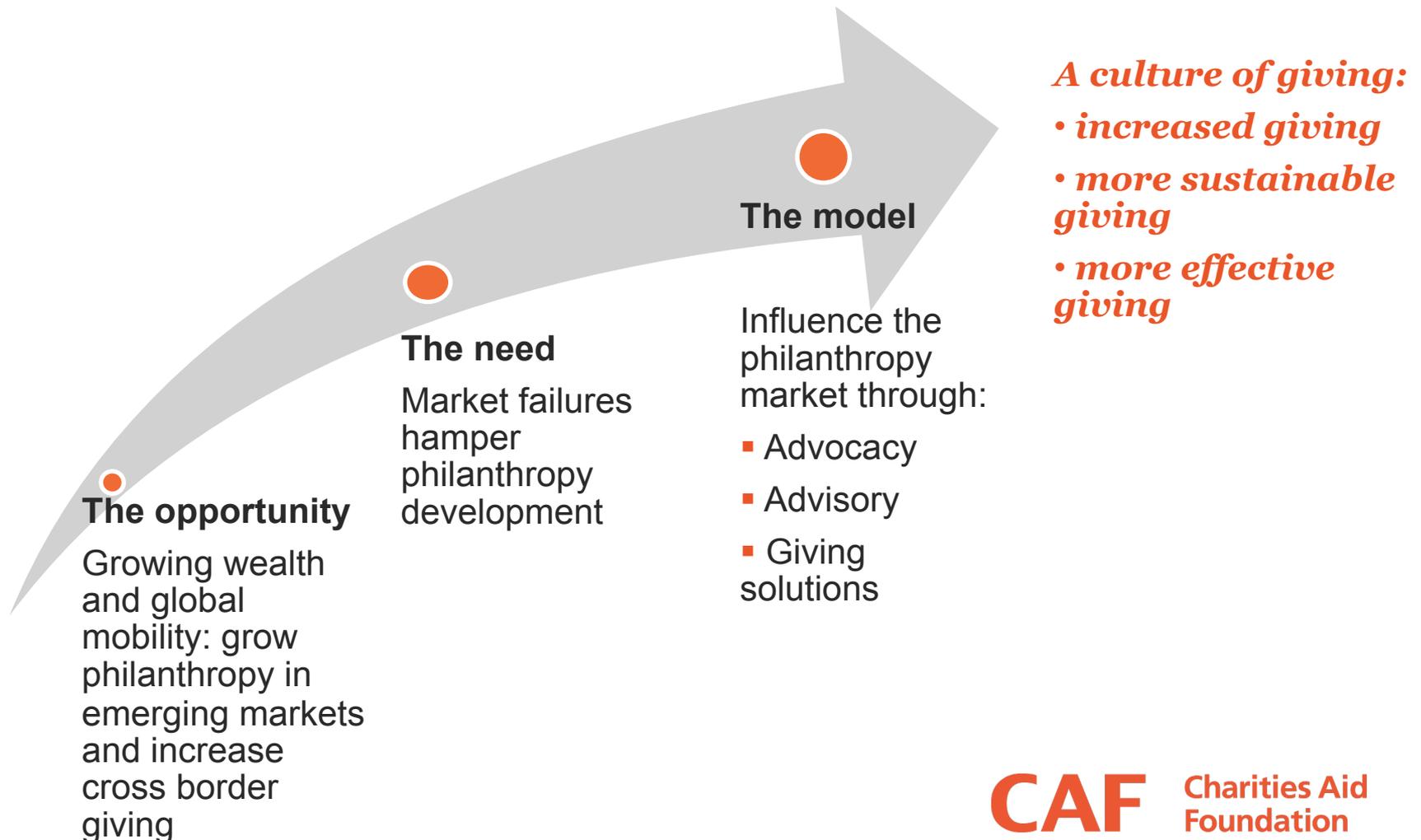


Applied to our services to donors

- From idea to impact: using an outcomes approach to plan and understand the impact of donors' programmes

Global Alliance theory of change

Objective: to catalyse philanthropy in emerging markets and grow cross border giving



Highlights so far

| <i>Emerging markets</i> | <i>Global Alliance</i> |
|--|---|
| <ul style="list-style-type: none">▪ Developed SROI capability in CAF offices in Brazil, Russia and South Africa▪ Supported SROI projects for clients▪ Local events to talk about social value creation and social impact measurement▪ Piloting/testing technology | <ul style="list-style-type: none">▪ Building impact measurement capability – internal training and newsletters▪ First round of social data collection against our social impact framework▪ Participation in global conferences▪ Engagement with SVI▪ Translated the SROI guide and supplements in Portuguese and Russian <p data-bbox="1329 1268 1789 1342">CAF Charities Aid Foundation</p> |

Challenges

1st layer:

- **Market sophistication** (e.g. Russia and M&E)
- **Skills and capabilities** (e.g. understanding the difference between outputs and outcomes)
- **Tools (including technology)** (e.g. proxies and existing research)
- **Language**

2nd layer:

- **Leadership** (internal/external –CSR/marketing departments)

3rd layer:

- Donor's understanding of the concept of social value creation/social impact and its measurement/importance
- Perceptions around complexity
- Distractions

4th layer:

- Not a priority for international organisations/funders
- **Resources** (NGOs/beneficiaries and donors)

Future

Internally

- Adapting ToC and framework to reflect learning to date
- Building a cohort of SROI accredited staff in CAF offices
- Building engagement in social impact measurement in emerging markets

Externally

- Donors/beneficiaries education
- Building engagement in social impact measurement in emerging markets (e.g. conferences, co-delivered training)
- Engaging with other organisations interested (SVI, for instance)

Questions????

Future

- Governments to introduce regulations around CSR/CSI and ways to articulate social impact
- International organisations to invest in social impact measurement funding
- Permanent forums to discuss ways to simplify reporting and reporting guides –counterfactual-- (without losing quality) and to discuss the importance of managing change to create social value