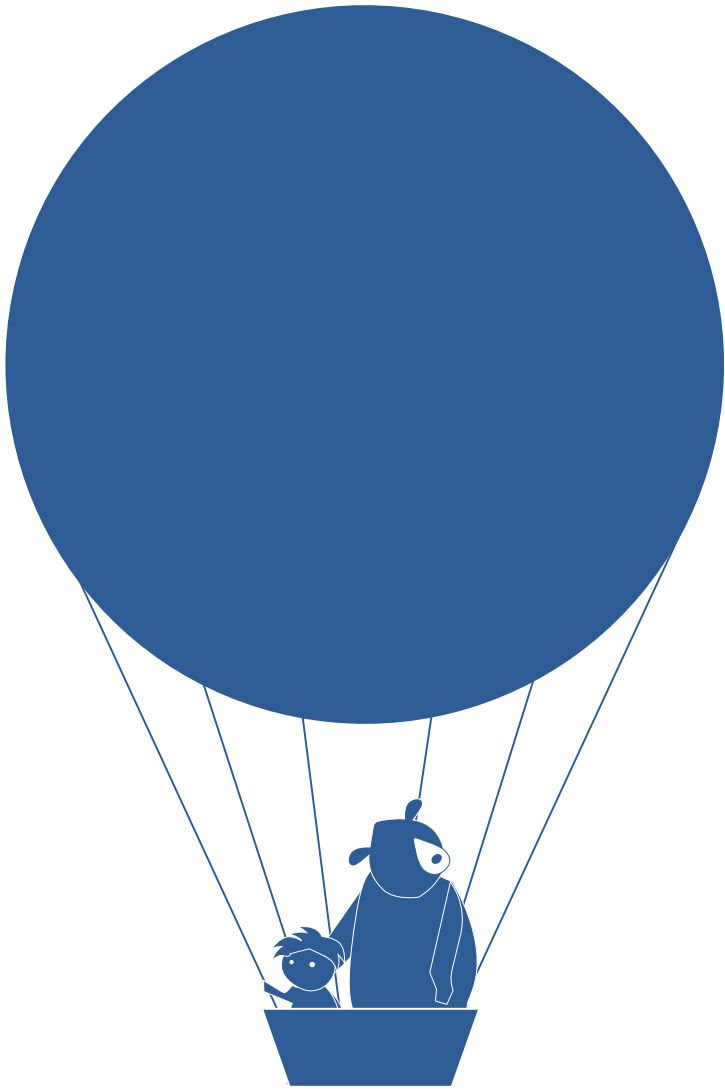


What Good Will It Do?

AN **SROI ANALYSIS**
OF THE *BALU UND DU*
MENTORING PROGRAM





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**value
for good.**



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Summary

In Germany, 2.6 million children (almost one in six) come from families that rely on social welfare. These children are three times less likely to learn how to read and write properly than children from higher socio-economic backgrounds. Often, schools are unable to intervene to compensate for problems children from poorer backgrounds can bring with them. This is where extracurricular preventive measures can make a difference. More specifically, if these programs foster character skills such as open-mindedness, social aptitude, conscientiousness, a positive attitude towards the world, and emotional stability, they have demonstrated the ability to be able to improve educational outcomes, increase job market opportunities, and health on a long-term basis.

The study aims to answer the question of what social return is yielded for each euro invested in *Balu und Du*.

One such preventive measure is mentoring, which has been shown to help close gaps in childhood personality development. The study at hand focuses on the mentoring program *Balu und Du* (in English: Baloo and You), which operates in 60 locations throughout Germany. As part of the program, a young adult mentor (Baloo) supports an elementary school child (Mowgli) over the course of a year; the two meet every week after school. The study provides an analysis of the program's potential benefits to German society based on evidence collected from primary and secondary sources.

More specifically, the study aims to answer the question of what social return is yielded for each euro invested in *Balu und Du*. It applies the principles of the SROI (Social Return on Investment) methodology—an established cost-benefit analysis tool for social projects—and emphasizes a project's social impact in monetary terms. While *Balu und Du* has already been scientifically evaluated multiple times, there has not yet been an assessment of the longer-term social return of this preventive program. This study focuses on the cohort of Baloos and Mowglis from 2012 and estimates the added societal value that will accrue from the start of program participation until the age of retirement.

***Balu und Du* yields an estimated SROI between 4.25 and 8.08. In other words, each euro invested contributes up to 8 euros back to society.**

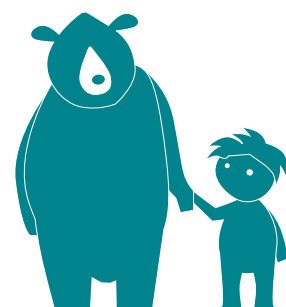
The result: The study estimates a total added societal value between 3.1 and 6 million euros for the 2012 cohort over a period of 60 years, expressed in 2014 euro values. The variance in benefits (from 3.1 to 6 million euros) exists because differences in the program's *intensity* were considered, as well as scenarios in which more or less participants benefit from mentoring long-term.

Most of the predicted societal value results from the positive effects of the program on Mowglis' educational outcomes and job market prospects (approx. 46%), as well as increased civic engagement on behalf of the Mowglis and Baloos (approx. 50%). Furthermore, a positive influence on the Mowglis' overall health also formed part of the added societal value (approx. 4%). A conservative approach was applied throughout the analysis (for instance, many potential program effects were not monetized).

When calculating an SROI, the impact of the program (in monetary terms) form the numerator, while the necessary investments forms the denominator. The social return on investment, expressed by the SROI coefficient, is what results from the calculation. If the coefficient is higher than one, the program has achieved a positive social return on investment.

For the 2012 cohort of the *Balu und Du* program, direct investments of 738,600 euros were made— representing the denominator of the SROI division. As a result of dividing the societal value generated by the investments made, *Balu und Du* yields an estimated SROI between 4.25 and 8.08. In other words, each euro invested contributes up to 8 euros back to society.

The analysis is clear: supporting *Balu und Du* and fostering the development and spread of the program is a worthy and valuable endeavor.

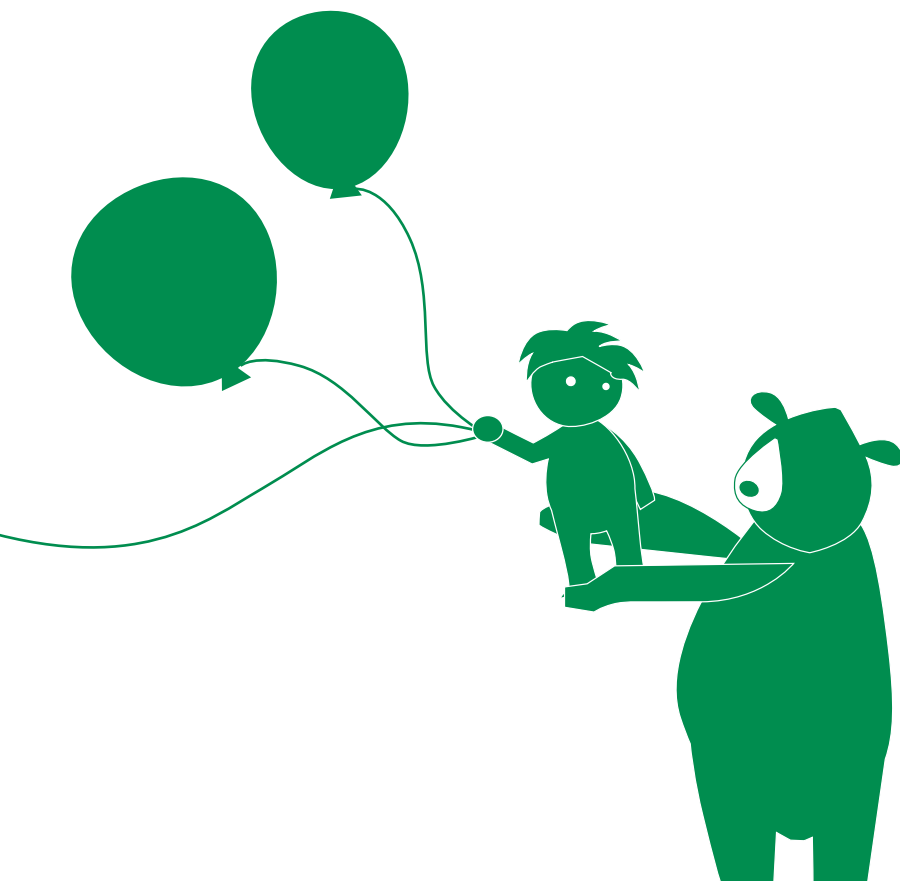


Chapter



Introduction

Mentoring programs like *Balu und Du* help young people develop important character skills beyond the support they get through school and family life.



1.1 Why are mentoring programs important?

Integration into society is a continuous developmental process, running from childhood through to adulthood. In childhood, the cognitive abilities cultivated from a school-based education form core building blocks for societal integration. At the same time, informal learning through various interactive processes develops personal values, social behavior, and practical day-to-day problem solving skills that are just as important for personality development. These are often referred to as “character skills”.¹

US education theorists have identified “the big 5 character skills”² as:

1. **Openness to experience**
2. **Conscientiousness**
3. **Extraversion**
4. **Agreeableness**
5. **Emotional stability**

Acquiring and mastering these skills early on in life can foster educational achievement, increase a person’s job prospects, and support physical and mental well-being.³

The big 5 character skills⁴

- 1 **Openness to experience** refers to being open-minded towards new aesthetic, cultural, and intellectual impressions.
- 2 **Conscientiousness** is the ability to be self-organized, act responsibly, and work diligently.
- 3 **Extraversion** describes a person’s control over their energy and interests in regards to the surrounding world. This can be expressed by a positive attitude and sociability.
- 4 **Agreeableness** defines a person’s ability to cooperate with others in a selfless way.
- 5 **Emotional stability** represents the ability to respond to change in a stable and predictable way.

Informal learning occurs in three different areas of a child’s life:

- via dedicated parents and/or family members
- via educational institutions like kindergartens and schools
- via extrafamilial and extracurricular role models

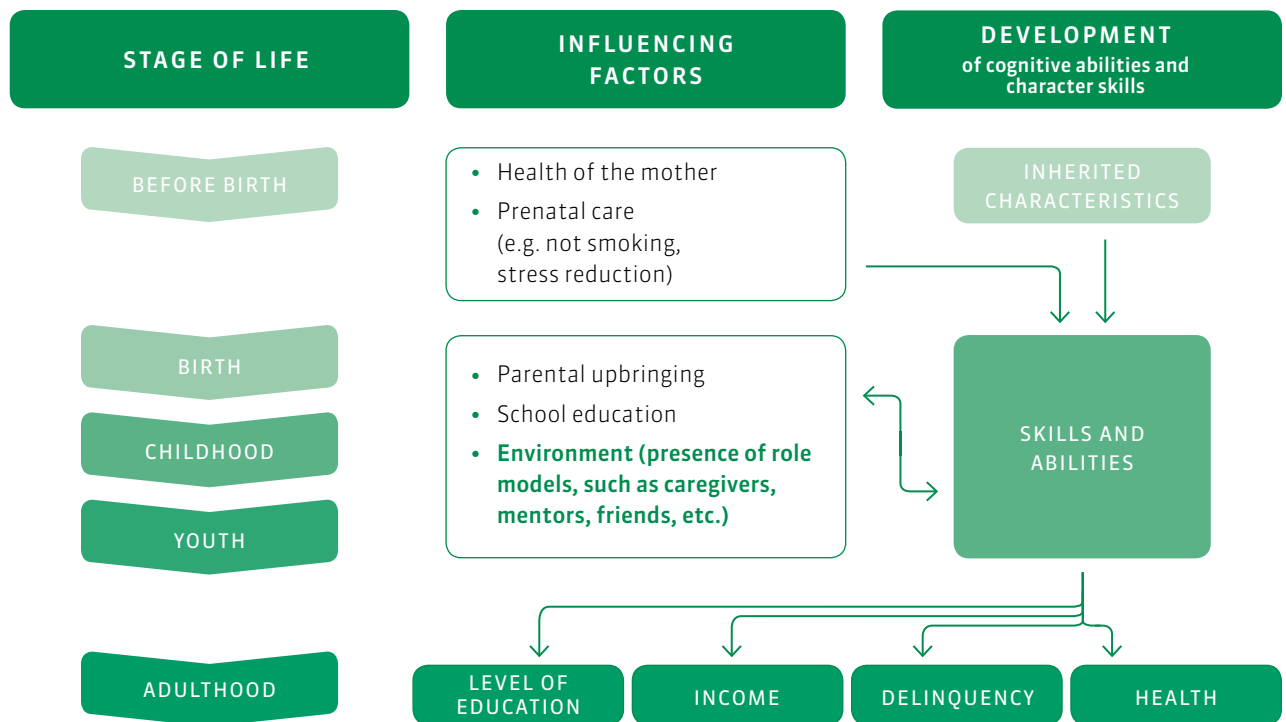
In most cases, schools focus on teaching cognitive skills and less on informal learning. This is why having dedicated parents and other role models outside the school environment is so important for children: they bear the critical responsibility of developing key character skills.

¹ Heckman, J. J., Kautz, T.: Fostering and Measuring Skills: Interventions That Improve Character and Cognition, 4–8.

² Ibid., 10ff.

³ Ibid., 20.

⁴ Ibid., 12.

Fig. 1 Informal learning – development of cognitive abilities and character skills⁵

Numerous academic studies have shown that not sufficiently acquiring these character skills can have lifelong consequences, including poor educational prospects, a higher likelihood of dropping out of school, a higher risk of social exclusion, difficulties finding a job, criminal or delinquent behavior, physical and mental health problems, and even a higher mortality risk (cf. Fig. 2). When they reach adulthood, socially vulnerable children often find themselves back where their lives began: reliant on social welfare.

Unfortunately, there are many children in Germany who come from socially vulnerable families. Around 2.6 million children live off of social welfare in Germany—almost one in six.⁶ The likelihood of them not learning to read or write properly is three times higher than for children coming from better circumstances.⁷

Many of these 2.6 million children come from single parent or immigrant families⁸ who have to cope with many other worries. In these conditions, there is often little room for child development to thrive.⁹ Informal learning—acquiring and mastering character skills—is often not prioritized.

However, the negative consequences of a lack of support from an early age are costly. These costs affect not only children and young people, they also impact society as a whole through lower educational outcomes that eventually lead to lower tax revenues and higher health or judicial costs. A 2009 Bertelsmann Stiftung study estimated the economic impact of insufficient education to be 2.8 trillion euros until 2090.¹⁰ Another 2011 study estimated annual costs that arise due to lack of vocational education amount to 1.5 billion euros.¹¹ Both figures refer specifically to the German federal economy.

2.6 million children live off of social welfare in Germany—almost one in six. The likelihood of them not learning to read or write properly is three times higher than for children coming from better circumstances.

⁵ Ibid., 32.

⁶ UNICEF: Kinder haben Rechte. UN-Konvention über die Rechte des Kindes, 11.

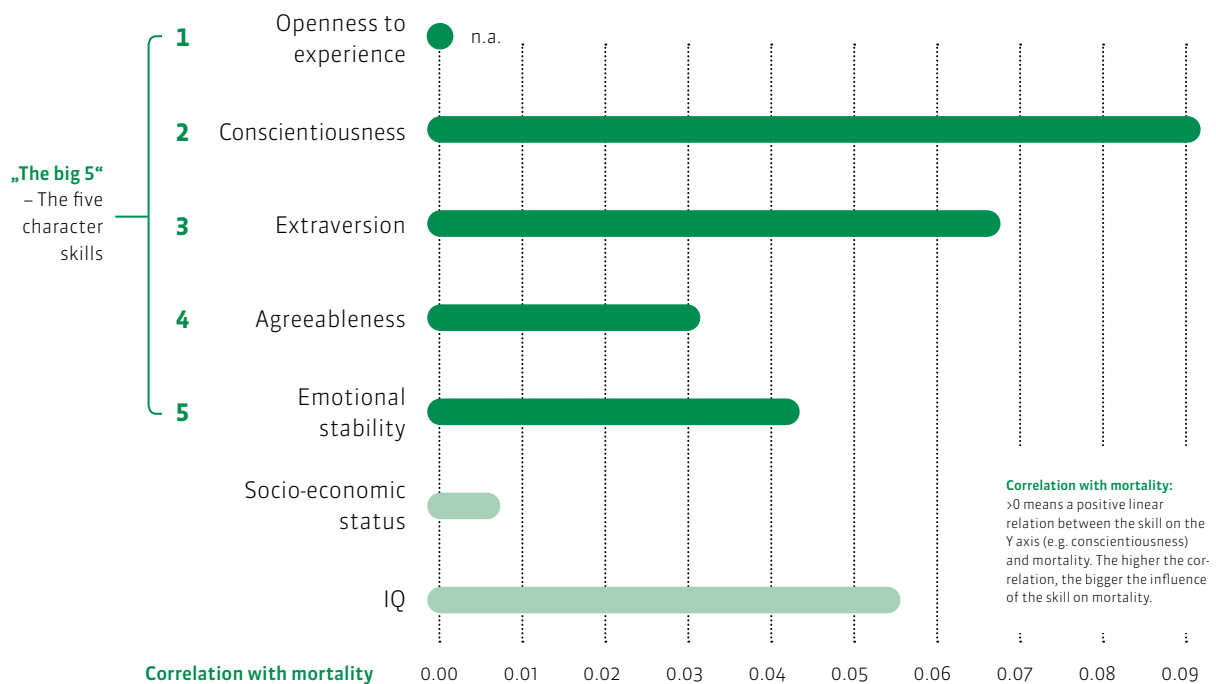
⁷ Ibid.

⁸ Ibid.

⁹ Phineo: Kinder in Armut – Armut an Kindheit. 12.

¹⁰ Wößmann, L. and Piopiunik, M.: Was unzureichende Bildung kostet – Eine Berechnung der Folgekosten durch entgangenes Wirtschaftswachstum, 9.

¹¹ Allmendinger, J. et al.: Unzureichende Bildung: Folgekosten für die öffentlichen Haushalte.

Fig. 2 The effect that character skills have on mortality¹²

Prevention programs implemented in early childhood can pave the way out of a social dead-end, especially when these programs work to correct character deficits. Mentoring programs form a key part of such preventive measures. They provide the child with a role model who normally comes from a different social background and can show the child different ways of life and give them new experiences.¹³

Mentoring programs have been evaluated numerous times and the results show that mentors help children develop character skills naturally.¹⁴ Their beneficial effects apply not only to the children and young people being supported, but also to the mentors.¹⁵ Beyond this, the voluntary work undertaken by the mentors lowers the costs of these programs, benefiting everyone involved.

Prevention programs implemented in early childhood can pave the way out of a social dead-end.

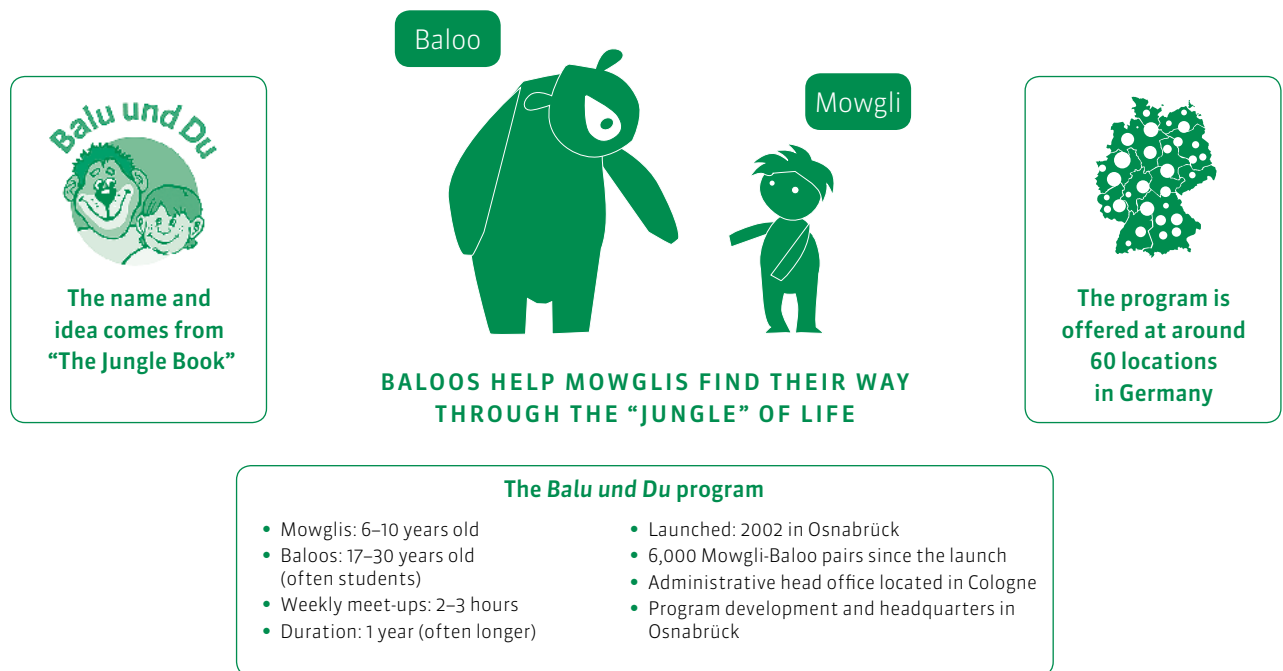
¹² Heckman, J. J., Kautz, T.: Fostering and Measuring Skills: Interventions That Improve Character and Cognition, 27.

¹³ Tierney, J. P., Grossmann, J. B., Resch, N. L.: Making a Difference – An Impact Study of Big Brothers Big Sisters, 2.

¹⁴ Ibid.; Heckman, J. J., Kautz, T.: Fostering and Measuring Skills: Interventions That Improve Character and Cognition, Abstract.

¹⁵ Die Welt online: Wer anderen selbstlos hilft, hält sein Herz gesund.

After 10 weeks, young people who engage in voluntary work exhibited lower inflammation and cholesterol values as well as less body fat than secondary school students in the control group. According to the study, this was particularly true for those participants whose levels of empathy and altruism increased during this time.

Fig. 3 **Balu und Du – program overview and locations**

1.2 The *Balu und Du* mentoring program

Balu und Du is a widespread mentoring program based in German-speaking areas,¹⁶ that supports children who have poor developmental prospects outside of school. A young, dedicated adult (Baloo) volunteers to sponsor a child (Mowgli) for at least one year. Baloo and Mowgli meet every week and spend time with each other for a few hours.

The program was created by Prof. Dr. Hildegard Müller-Kohlenberg. Her colleague, Prof. Tilly Bakker-Grunwald, volunteered at a mentoring program in Israel and was a consultant on the program's promising approach. The name and concept behind *Balu und Du* were inspired by Rudyard Kipling's "The Jungle Book," where the patient, friendly bear Baloo leads his friend—a human boy named Mowgli—through the dangers and challenges of the jungle. On their journey, Baloo lets the little boy learn, try new things, and shows him how to cope with different and, at times, difficult situations. Here, fun and ample times to listen are never in short supply. Just like in the story, mentors (Baloos) use personal attention, care, and active recreational activities to help the children (Mowglis) gather new experiences and learn how to handle everyday challenges.

The concept is simple: The Baloos are young, responsible people between 17 and 30 years old (predominantly university or secondary school students). In addition to the weekly meet-ups with their Mowglis, they are also tasked with regularly participating in a support seminar. This allows them to meet other mentors, exchange ideas, and get practical advice, as well as training and development from qualified specialists. The Baloos also keep a password-protected online journal, which is promptly read by the seminar leaders who then provide feedback and advice. The mentors are fully supported at all times, which indirectly benefits the children.

Mowglis are elementary school children between 6 and 10 years old who are about to enter the "jungle of life." Generally, teachers recommend children for the program, with parental consent. In most cases, the children are those whom teachers are particularly concerned about due to reasons such as poor social integration or signs of learning difficulties. Around one-third of Mowglis have an immigrant background. The gender ratio is fairly even—there are around as many male as there are female Mowglis.¹⁷ In contrast, the Baloos are mainly women (80%).

¹⁶ One of the *Balu und Du* locations is in Linz (Austria).

¹⁷ Balu und Du: Über das Projekt; Müller-Kohlenberg, H. und Szczesny, M.: Prävention im Grundschulalter geht auf die Vorläufermerkmale von Fehlentwicklungen ein – Warum „Balu und Du“ weder ein Trainingsprogramm noch eine Therapie ist, 1–3.

The Baloo-Mowgli duos (or pairs) generally team up at the start of the school year or semester and meet over the course of one year until the beginning of the summer or winter break (in some cases, they meet over an even longer period).¹⁸

Since the program's launch in 2002, around 6,000 Baloo-Mowgli pairs have formed across Germany. These partnerships are coordinated at more than 60 program locations. Various network partners collaborate on the ground with the non-profit association *Balu und Du e.V.*¹⁹ Many of the program partners are schools and universities that offer the mentoring program to their students as part of education-related courses and subjects. This approach has enabled the program to develop relatively quickly in new locations.

The *Balu und Du e.V.* association office is in Cologne and the educational concept is developed at the association's headquarters in Osnabrück. The project's partners are the University of Osnabrück, which supports the development of the program, and the Diözesan-Caritasverband des Erzbistums Köln e.V.²⁰

Balu und Du operates within the field of primary prevention.²¹ Children in precarious situations are given the chance to strengthen their social competence and their individual responsibilities before social problems and disadvantages occur. This strengthening process takes place at an age when undesired developments are relatively easy for adult role models to correct.

Balu und Du has a particularly positive impact in two social fields:

1 Individual support of elementary school children:

The program focuses on elementary school children who grow up in difficult conditions. Undesired developments in these children are recognized early, setting the pace for a smooth transition into adolescence and adulthood.

2 Empowering young people to get involved in society:

Balu und Du offers young adults the opportunity to build key educational and societal competencies. The support services for Balooos ensure that these young adults can reflect on their experience and optimally care for the children. The program is designed to encourage Balooos to take on individual responsibility, thus making a valuable contribution to society.²²

Since the program launched in 2002, around 6,000 Baloo-Mowgli pairs have formed across Germany. These partnerships are coordinated at more than 60 program locations.

¹⁸ The collective name for all pairs formed in one year is (year) cohort.

¹⁹ Balu und Du – Jahresbericht 2012, 11.

²⁰ Balu und Du: Über uns.

²¹ Deutsche Gesellschaft für Nährstoffmedizin und Prävention (DGNP) e. V.: Definition der Präventionsmedizin. Primary prevention is about maintaining health and preventing disease. It begins before an injury, disease, or irregular behavior occurs, and looks for the causes and risk factors that could lead to it. This approach focuses on young people. In contrast, secondary prevention is about the early detection or prevention of disease progression. Tertiary prevention prevents the occurrence of complications in an already manifest disease.

²² Balu und Du – Jahresbericht 2012, 6.

1.3 Objective of the study

Public and private funding bodies are often faced with the same problem: they're forced to narrow down a field of non-profit projects in need of funding and delegate support where it makes the most sense. An analysis of the social return on investment (SROI) can help by comparing the added value achieved with the investments made. This makes it possible to determine if investing in a particular project is worthwhile.

The positive effects of *Balu und Du* have been analyzed multiple times, primarily in regards to the basic competences and health of the Mowglis. Positive short-term outcomes — like an increase in concentration and better mental and physical well-being — have already been proven. In some cases, the effects lasted two years following the end of the program. Therefore, the program is particularly well-suited to having its long-term social return on investment calculated.

The aim of this study is to predict the effect of *Balu und Du* in monetary terms. An SROI analysis makes it possible to compare financial investments with the expected effects. Therefore, the central research question is: What are the long-term overall benefits to society that result from one euro being invested in *Balu und Du*? By exploring this question, public and private donors are given an indication of the impact of program funding, as well as which additional revenue or savings the public sector can expect.

The cost-benefit ratios of mentoring programs have already been researched in other countries using various methods of analysis, including SROI. A good example of this is *Pathways*, an extracurricular program for disadvantaged children in Canada.²³ Australia's *Literacy Buddies Program*, a reading and writing program for elementary school children, also delivered transparent evidence of a positive added societal value for every dollar invested.²⁴ The SROI of mentoring programs in Germany, like *Balu und Du*, has not yet been calculated.

An SROI analysis makes it possible to compare financial investments with the expected effects. Therefore, the central research question is: what are the long-term overall benefits to society that result from one euro being invested in *Balu und Du*?

²³ The Boston Consulting Group: BCG Assessment of Pathways to Education – Executive Summary, 2.

²⁴ Net Balance Foundation: An SROI study of the Literacy Buddies Program for Ardoch Youth Foundation, 7.

Chapter



Methodology

A “Social Return on Investment” analysis makes it possible to put a monetary value on a program’s social impact, allowing for the social return on each euro invested to be calculated.

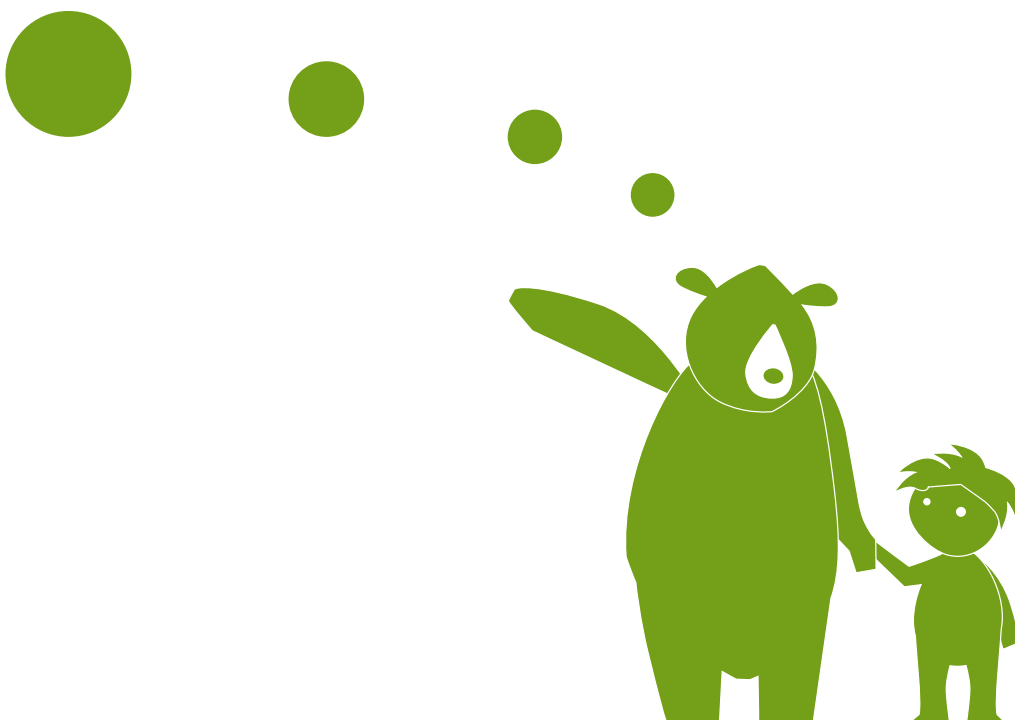


Fig. 4 How is the SROI coefficient calculated?



2.1 Social return on investment — an overview

An SROI analysis²⁵ is very similar to calculating a Return on Investment (ROI). The investments made are compared with the added value achieved to determine an ROI for each contributed euro. The major difference lies in the fact that when calculating an SROI, the social gains from activities or measures (also called psychosocial added value) are taken into account, in addition to the usual commercial profits of an organization. The achieved added societal value is measured using impact indicators and, with the help of proxy financial values, is turned into monetary units.

The result of an SROI analysis is a figure indicative of impact: the SROI coefficient expresses the social benefits of a project — converted into a monetary value (euro) — in relation to investments made (in euro). This approach allows the social return on investment of a project to be determined.

If the achieved value is higher than the original investment, the SROI coefficient is higher than 1. If the added societal value turns out to be smaller, the SROI coefficient is less than 1. In this way, the SROI key figure allows for the (cost) benefit of a program to be determined quickly.

Economic crises and a shift in demographics have increased pressure on social institutions and non-profit organizations to provide evidence that their resources are being put to the best possible use. Proof that money is being used effectively and efficiently is increasingly important.

This is where an SROI serves as an auxiliary variable: it can offer private and public investors a basis for making decisions on whether to fund a particular initiative. At the same time, organizations and projects also benefit from the SROI figure, as it can be used as a convincing argument in fundraising.²⁶

²⁵ SROI calculations can be made with an outlook on the future, as a type of prediction, or in the past as an evaluation. The calculation timeframe for this study was directed towards the future to be able to integrate the promising long-term successes of *Balu und Du*.

²⁶ Wirtschaftsuniversität Wien: Die SROI Analyse – Kompetenzzentrum für Nonprofit Organisationen und Social Entrepreneurship WU.

The main advantage of an SROI analysis is the clear and transparent representation of the social return on investment through a single number. There is, however, no standardized method for selecting and monetizing impact indicators. Given the uniqueness of geography, stakeholder groups and interventions of each program, most SROI calculations are based on very individualized assessments of financial value attributable to the benefits of a good or service. This means that for the moment, comparing SROI coefficients with each other can only be done on a limited basis.²⁷

Critics also see a danger in economizing the social sector through evaluation methods that monetize social benefits.²⁸ Additionally, many have criticized SROI for over-emphasizing private capital markets, vocabulary, and ratio calculation. This criticism is not unjustified, as a number should not be used as the sole deciding factor. At the same time, many social project investors are market-based players who regularly rely on quantified cost and benefit estimates, as well as ratios, to inform their decisions. In light of this reality, there is little reason not to use market-based language and methods—such as an SROI analysis—to solicit broader support for social projects.

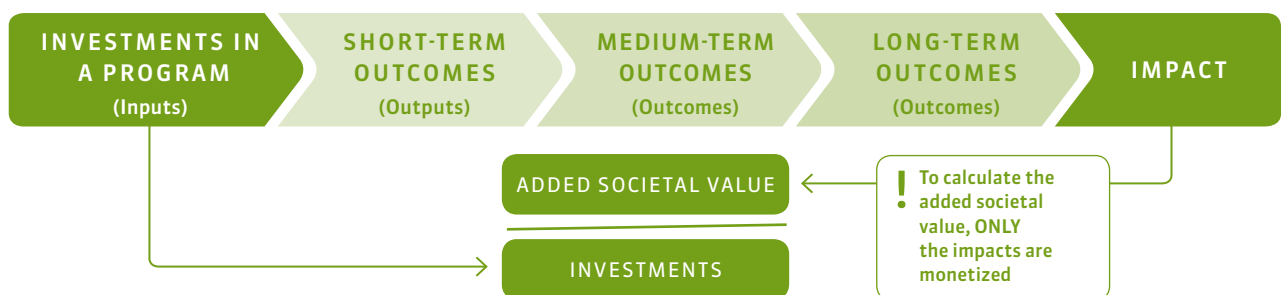
History of the SROI methodology

The first widely known SROI analysis was done in California by the **Roberts Enterprise Development Fund (REDF)** in the late 1990s.²⁹

In Europe, The **New Economics Foundation**, a London-based think tank, revised this method in 2003.³⁰

The SROI method has also started to gain prominence in the non-profit sector of German-speaking areas. The universities of Vienna and Heidelberg as well as some non-profit research centers, for example, are exploring and applying the methodology.³¹

Fig. 5 The steps of an SROI analysis



APPROACH

1	Selecting the program and the type of SROI analysis	To be determined at the start: Should the added societal value by a program be evaluated retrospectively? Or should a program's future SROI be predicted?
2	Determining the stakeholders	The central questions are: Who is affected? For which groups is added value created? And who contributes to this added value?
3	Determining the impact value chain and indicators	Key to an SROI analysis is determining the SROI figure. For this purpose, impact indicators are determined along four phases of the impact value chain.
4	Data collection	For the period of the SROI analysis, the data on funds (inputs), short-term outcomes (outputs), medium and long-term outcomes (outcomes), and impact (impact) are collected along the defined indicators.
5	Assessing the data & SROI calculation	Data gathered through primary and secondary sources is analyzed to ensure robust links between outputs and impacts. Proxy financial variables help to monetize the impact indicators. The added societal value of the program is then divided by the initial investment, thus yielding the final SROI coefficient. In this step, several sensitivity analyses are often carried out to calculate the SROI coefficient using different scenarios and assumptions.
6	Presenting the social return on investment	An SROI report provides an explanation of the calculations.

²⁷ Ibid.

²⁸ Ibid.

²⁹ REDF (Roberts Enterprise Development Fund): REDF – Investing in Employment and Hope.

³⁰ New Economics Foundation: nef – economics as if people and the planet mattered.

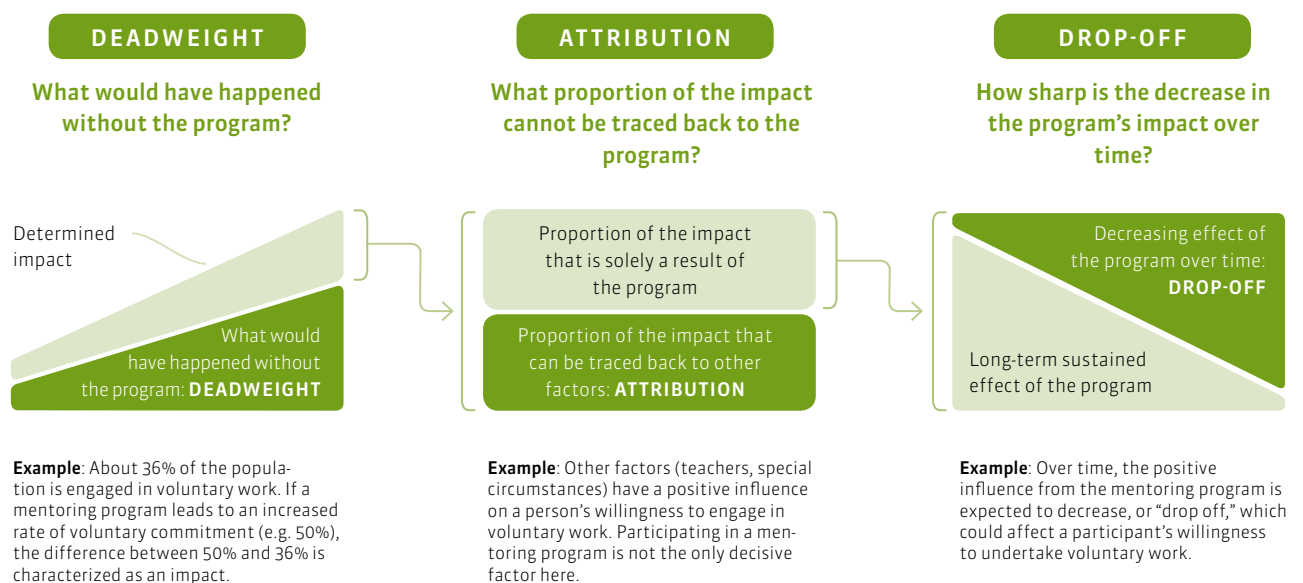
³¹ Wirtschaftsuniversität Wien: Die SROI Analyse – Kompetenzzentrum für Nonprofit Organisationen und Social Entrepreneurship WU; CSI – Centrum für soziale Investitionen und Innovationen der Universität Heidelberg: Erfolge messen und belegen. Transparenz schaffen mit der „Social Return on Investment“-Methode.

2.2 The SROI calculation formula

SROI calculations are a type of cost-benefit analysis and are performed using Discounted Cash Flow (DCF) principles. All future revenues are multiplied by a discount rate³² and converted into present value. This is due to the fact that one euro earned over 10 years is worth less than one euro earned today. Likewise, all investments made in the past are converted into present value using a rate of inflation (cf. Fig. 8, p.23). Additionally, sensitivity analyses are conducted to show how the SROI coefficient varies when important parameters or assumptions change (e.g. the intensity of the effect, the number of persons affected, etc.). In this SROI analysis, sensitivity analyses were conducted in four different scenarios (cf. Fig. 17, p. 33).

We live in a complex societal system where many different factors can influence a program's impact. To this end, the parameters ("deadweight," "attribution," and "drop-off") are taken into consideration in an SROI calculation. As a first step, the so-called "deadweight" parameter is deducted from the impact. Here, "deadweight" refers to the value of changes and effects that would still occur, even without the program's existence.³³ The next parameter, "attribution," requires an assessment of what social impact can or cannot be ascribed to the program. Effects that could be caused by other people or organizations are, consequently, not included in the calculation. Lastly, taking into consideration that a program's effect can decrease over time, the "drop-off" parameter is considered as part of an SROI calculation (where relevant). These three parameters have also been taken into account throughout this study.

Fig. 6 Deadweight – attribution – drop-off



³² A discount rate is the rate at which a payment in the future must be multiplied in order to calculate the present cash value of said payment. This factor is often determined by the interest rates of government bonds.

³³ The SROI Network Intl.: SROI Network 2012, Stage 4: Establishing Impact, 56–62.

2.3 Applying the SROI calculation methodology to *Balu und Du*

The SROI coefficient determined in this calculation purely represents a projected value. To date, no long-term studies have been conducted on the impact of *Balu und Du* and as a result, the added societal value is estimated on the basis of assumptions. The program has not been in existence long enough to accurately calculate and monetize its long-term outcomes.

The analysis is limited to the 2012 cohort, during which a total of 731 Mowgli/Baloo pairs were formed (cf. Fig. 7). In line with this, only the investments that were necessary in 2012 to implement the program and support the 731 pairs have been considered.³⁴ Two reasons explain the choice behind the 2012 cohort: on one hand, this cohort's data is the most complete and up-to-date. On the other, it is (for the most part) the same cohort participating in an ongoing, longitudinal study being conducted by the University of Bonn's Prof. Dr. A. Falk.³⁵ This study examines the long-term impact of the program on a cohort of Mowglis who began the program in October 2011. The SROI value that we are determining as part of this study may, in the future, be verified by the results of Prof. Falk's study.

For the study at hand, conservative calculations have been used to avoid projections that are too optimistic or too arbitrary. The following five measures are applied to safeguard this:

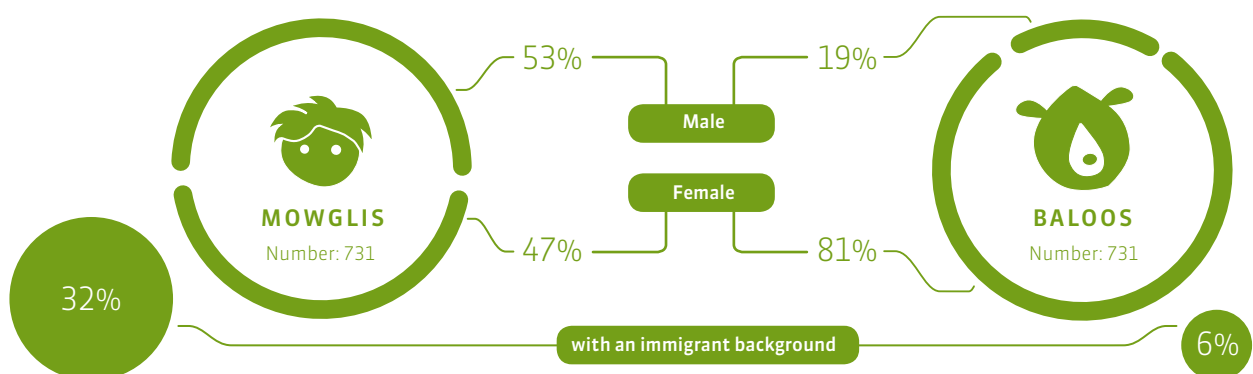
1 Selective monetization

This analysis ignores effects for which no concrete evidence can be found in evaluations of the program or in secondary literature. This means that secondary outcomes, such as criminal behavior, were not included. Only direct effects, such as a greater voluntary commitment from the children and improved performance at school, were considered.

2 Limiting the stakeholder group³⁶

The social return on investment was calculated exclusively for two particular stakeholder groups: the Baloos and the Mowglis. The question of how the program impacted them and what direct outcomes arise for them, for society, and for the public sector served as the foundation of this calculation. Potential ripple effects, such as positive outcomes on Mowglis' families (parents, siblings) and friends, were disregarded.

Fig. 7 Demographic breakdown of the 2012 cohort³⁷



³⁴ The analysis refers to the investments of Balu und Du e.V. and of the network partners in the year 2012. They were applied at a 1.5% rate of inflation, and were calculated according to the euro value in 2014.

³⁵ The title of the study is: Evaluationspanel der Universität Bonn: Entwicklung kognitiver und nicht-kognitiver Fähigkeiten durch die Teilnahme am Mentorenprogramm "Balu und Du" ("Evaluation panel of the University of Bonn: Developing Cognitive and Non-cognitive Abilities via Participation in the Mentoring Program 'Balu und Du'"),

short: "Bonn Intervention Panel" (BIP). The study focuses on a controlled, randomized study design with over 700 participating families. The children's development is documented in detail, courtesy of annual surveys, allowing the long-term effects of *Balu und Du* to be analyzed.

³⁶ A stakeholder is characterized as a person or group that has a vested interest in the course and development of a project, process, or organization.

³⁷ Source: Balu und Du e. V.

Tab. 1 **Balu und Du stakeholder groups**

STAKEHOLDER GROUPS	INCLUDED/EXCLUDED	REASONS
Mowglis (children between 6 and 10 years old)	Included	Prosper as direct beneficiaries of the program
Baloos (volunteers between 17 and 30 years old)	Included	Benefit from voluntary work
Local cooperation partners (locations)	Included ³⁸	Invest the most in the program's implementation and benefit by fulfilling their social mission, receiving additional PR, etc.
Balu und Du e.V. (parent organization)	Included ³⁸	Responsible for leading the entire program, quality assurance, etc. Has the second largest investment in the program
Parents of Mowglis	Excluded	Only benefit indirectly from the positive changes that arise for their children
Classmates, friends of Mowglis	Excluded	Only benefit indirectly from the positive changes that arise for the Mowglis
Siblings of Mowglis	Excluded	Only benefit indirectly from the positive changes that arise for their Mowgli siblings
Public sector (the state)	Included	Benefits from additional tax contributions and lower costs due to a reduced use of social benefits

3 Conservative assumptions about the program's effects

All effects that would have occurred without the program or could be attributed to other influencing factors were estimated at a comparatively high rate (deadweight and attribution). Beyond this, the entire analysis is based on the assumption that only a small number of participants experienced change as a result of taking part in *Balu und Du*. Only those directly affected were considered when calculating the added societal value.

4 Limited duration of the impact

The program's impact cannot last forever. Because of this, the effects were only forecasted until 2071—the year the 2012 Mowgli cohort will reach age 67 and, consequently, the end of their working lives.³⁹ In the case of the Baloos, the results calculation ends earlier to reflect the fact that the Baloos are older. This ensures the estimate of the end value is not set too high. Some effects will decrease (drop-off) prior to the year 2071; this has also been factored in.

5 Consideration of negative outcomes

Finally, possible negative outcomes, such as feeling loss as a Mowgli or Baloo upon completion of the program, have been taken into account—even in cases where those consequences have not, to date, been documented in evaluations. These negative outcomes reduce the added societal value by *Balu und Du*.

³⁸ For these stakeholders, only the investments made into the program were included in the analysis and no outcomes were monetarily assessed, as the direct positive effects of the program only affect Mowglis and Baloos.

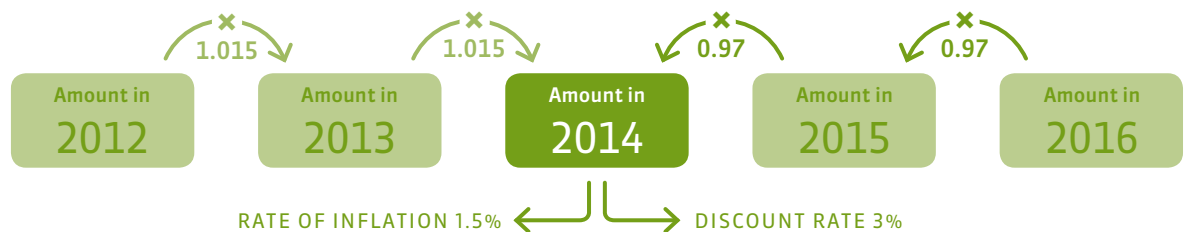
³⁹ Mowglis are between 6 and 10 years old. The authors therefore assume an average age of 8 years old.

2.4 Rate of inflation and the discount rate

The year 2014 serves as the base year for all calculations. A (compounded) 1.5% rate of inflation was applied to past financial values to convert them to euro values from 2014. This same rate was also applied to *Balu und Du* program investments incurred in 2012. A discount rate of 3% was applied each year for societal

benefits projected beyond 2014. These values correspond to the inflation and discount rates used in other respected publications.⁴⁰

Fig. 8 **Base year, rate of inflation, and discount rate of the SROI calculation**



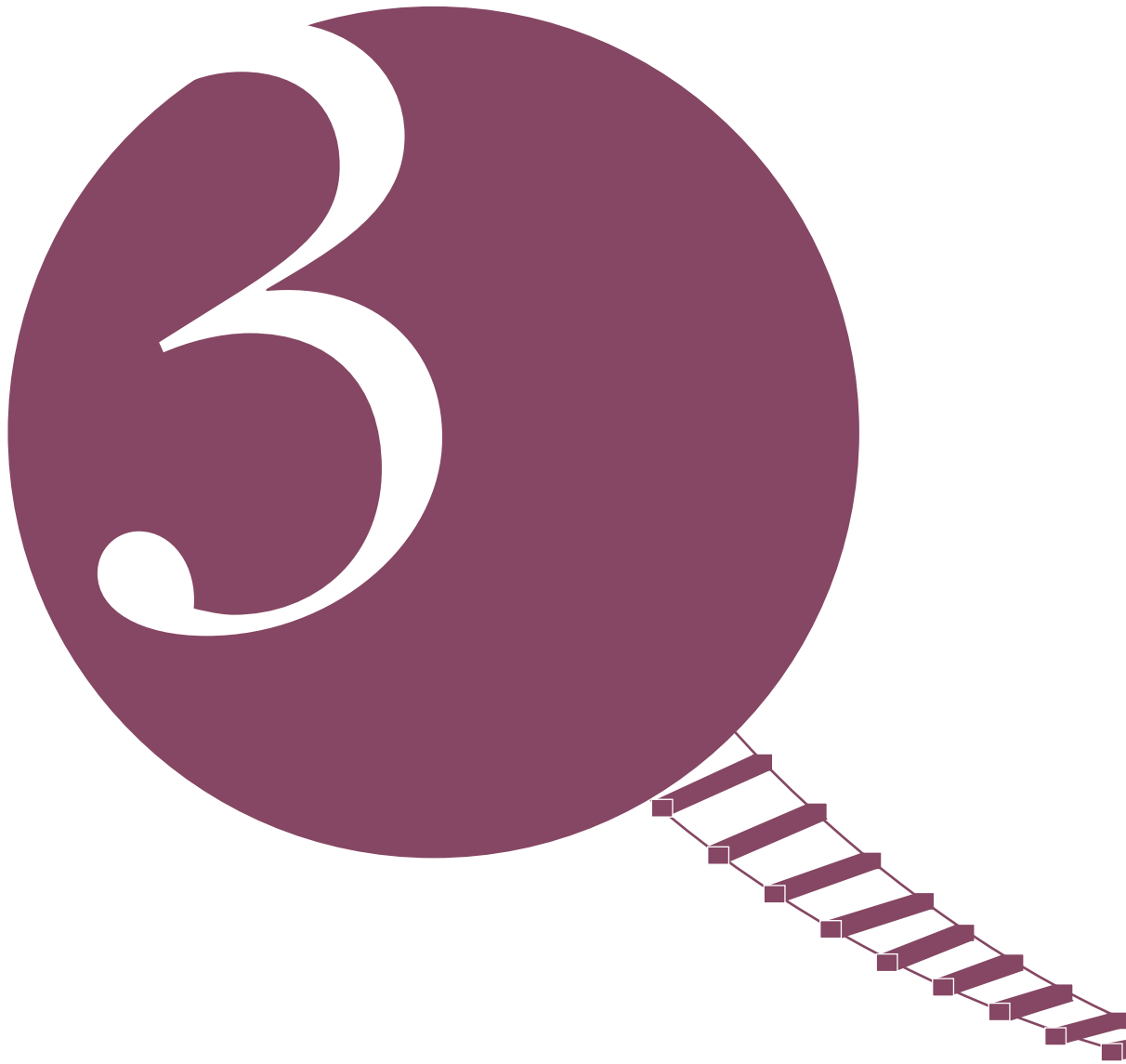
2.5 Data collection

Data was collected for this SROI analysis using the following methods:

- Firstly, an extensive inventory of previous scientific studies done on *Balu und Du* took place, making it possible to verify the short-, medium-, and long-term outcomes of the program.
- These program outcomes were then discussed in a workshop with the responsible parties and from there, transferred into an impact value chain.
- Secondary literature about comparable programs pointed out the possible long-term outcomes of *Balu und Du*.
- The journal entries made by Baloos in addition to a survey completed by current Mowglis provided additional insight on the short-, medium-, and long-term effects for the participants of the program.
- Investments made by cooperation partners were recorded and verified in an email survey, as well as telephone interviews.
- Discussions with the program's leadership group and a review of the annual accounts provided information on the running costs of the non-profit association, *Balu und Du e. V.*

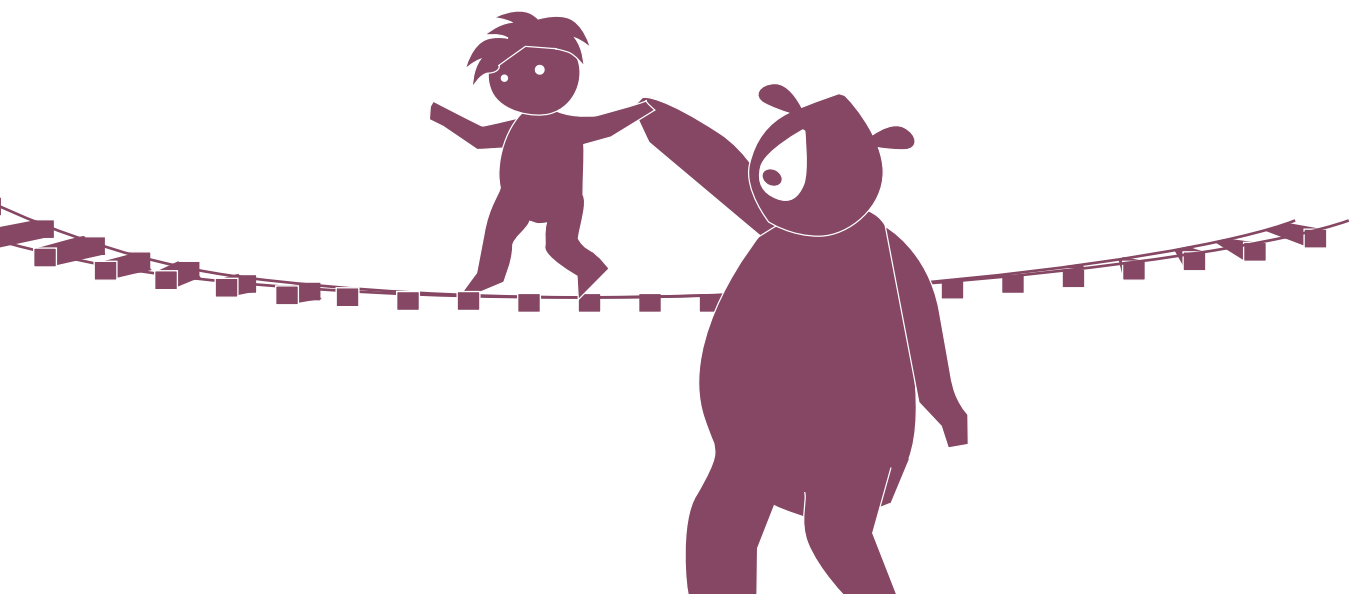
⁴⁰ cf. Allmendinger, J. et al.: Unzureichende Bildung: Folgekosten für die öffentlichen Haushalte.

Chapter



Calculating the Added Societal Value

The social impact generated over time on the stakeholder groups is outlined through impact value chains. This way, the long-term added societal value can be identified, quantified and ultimately, monetized.



3.1 Introduction

A key aspect of an SROI analysis is monetizing a program's individual effects to convey its added societal value in euros. However, it is first necessary to clarify the effects of the program.

Numerous scientific evaluations of *Balu und Du*—particularly those carried out by the University of Osnabrück—provide evidence of the direct impact of the program. This SROI analysis builds on these results.

Tab. 2 Overview of evaluations carried out on *Balu und Du* to date

	AUTHOR	STUDY	YEAR / TIME PERIOD	EXAMINED / INTERVIEWS CONDUCTED WITH
1	B. Borrmann, S. Drexler, H. Müller-Kohlenberg	Förderung von Kindern aus sozial benachteiligten Familien durch das Mentorenprojekt „Balu und Du“ (“Promoting Children from Socially Disadvantaged Backgrounds through the Mentoring Program ‘Balu und Du’”)	2009–2011	<ul style="list-style-type: none"> • 141 Mowglis • 158 Control group children • 2,772 Journal entries by Baloos
2	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg	Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“ (“Study on the Sustained Impact of the Mentoring Program ‘Balu und Du’”)	2012	<ul style="list-style-type: none"> • 403 Baloos • 27 Parents (mainly mothers) • 37 Mowglis assessed by teachers
3	H. Angermann, L. Ohlemann	Die Mentoringbeziehung im Präventionsprojekt „Balu und Du“: Eine Analyse des Zusammenhangs von inhaltsanalytisch erhobenen Beziehungsaspekten mit der Veränderung des Cortisolspiegels der Mentees (“The Mentoring Relationship in the Prevention Project ‘Balu und Du’: An Analysis of the Connection between Relationship Aspects, Gathered via Content Analysis, and the Mentees’ Change in Cortisol Levels”)	2011–2012	<ul style="list-style-type: none"> • 20 Mowglis • Journals of 20 Baloos
4	M. Schlüter, H. Müller-Kohlenberg	Feststellung der Wirksamkeit von Präventionsmaßnahmen am Beispiel des Mentorenprogramms „Balu und Du“: Effektstärken, Netto-Effektstärken und die Funktion von Kontrollgruppen (“Determining the Effectiveness of Prevention Measures Using Mentoring Program ‘Balu und Du’ as an Example: Effect Strength, Net Effect Strength and the Function of Control Groups”)	2008–2009	<ul style="list-style-type: none"> • 102 Mowglis evaluated by teachers • 92 Mowglis evaluated via aggression testing • 2 different control groups N=51 and N=36 evaluated by teachers
5	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg	Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? (“Civic Engagement as an ‘Additive Model’ for Building Key Competencies: Which Competencies Can Be Acquired via the Mentoring Project ‘Balu und Du’?”)	2009	<ul style="list-style-type: none"> • 74 Baloos • Control group: 208 non-Baloos
6	D. Esch, M. Szczesny, H. Müller-Kohlenberg	„Balu und Du“. Ein Präventionsprogramm zur Vermeidung von Devianz, Aggression und Gewalt im Jugendalter (“‘Balu und Du’: A Prevention Program to Prevent Deviance, Aggression, and Violence in Adolescence”)	2002–2005	<ul style="list-style-type: none"> • 34 Mowglis • 51 Teachers • 14 Parents
7	H. Müller-Kohlenberg	The Mentoring Programme „Balu und Du“: Compensation for Lacking Early Competencies and Development of Basic Soft Skills by Informal Learning	2004	<ul style="list-style-type: none"> • 49 Mowglis

POSITIVE EFFECTS DETERMINED (SELECTION):

- ⊕ Higher concentration
- ⊕ More engaged classroom participation
- ⊕ Better self-organization
- ⊕ Willingness to accept criticism
- ⊕ Enhanced everyday social competencies
- ⊕ Improved conflict management skills

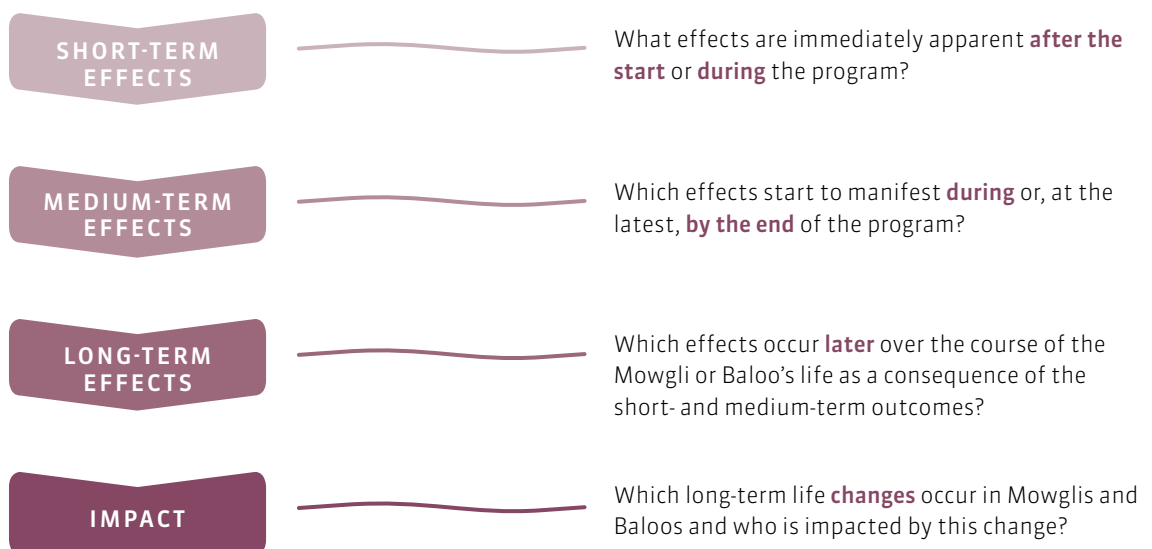
3.2 The *Balu und Du* impact value chain

In an SROI analysis, a program's effects are structured along an impact value chain. For this reason, a workshop with various stakeholders of *Balu und Du* was held with the goal to develop the impact value chain and approach for conducting the SROI study.⁴¹

In this workshop, all positive and negative outcomes for the two relevant stakeholder groups (Mowglis and Baloos) were discussed and plotted out along a timeline.

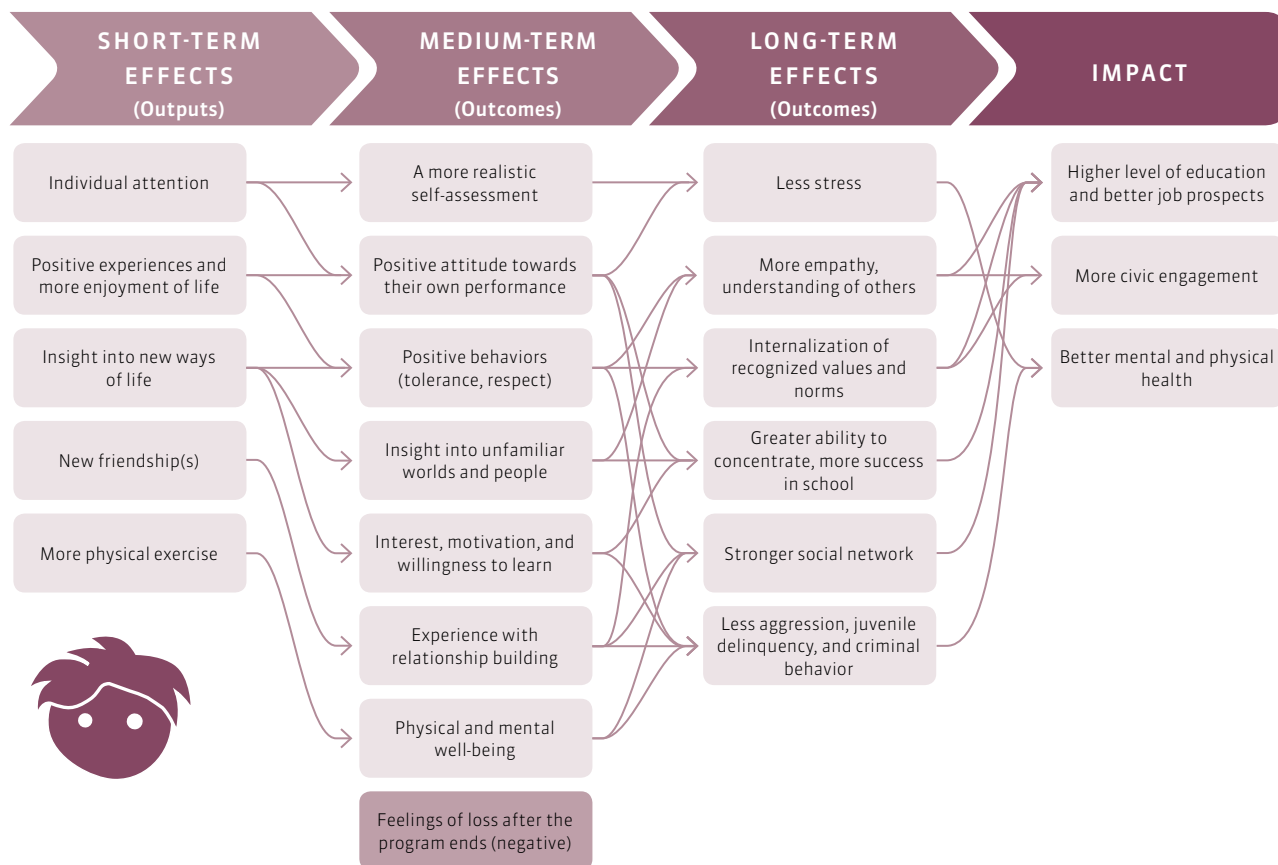
The impact value chain for short-, medium- and long-term outcomes developed in the workshop will be introduced in the remainder of this chapter. It illustrates the developmental path that Mowglis and Baloos follow during and after their participation in the mentoring program. It also outlines the effects *Balu und Du* has on the mentors and children. Only these effects were monetized to calculate the added societal value (as explained in Chapter 2, cf. Fig. 5). In order to ensure a well-founded analysis, all effects identified along the impact value chain were subsequently mapped against any existing *Balu und Du* evaluation results, as well as relevant secondary sources.

Fig. 9 The *Balu und Du* impact value chain



⁴¹ The participants of the workshop, which took place in June 2014 in Osnabrück, included teachers of Mowglis, location coordinators, former Baloos, the program's educational leadership, *Balu und Du* e.V. management, and employees of Social Impact Consulting GmbH.

Fig. 10 The impact value chain for Mowglis (mentees)



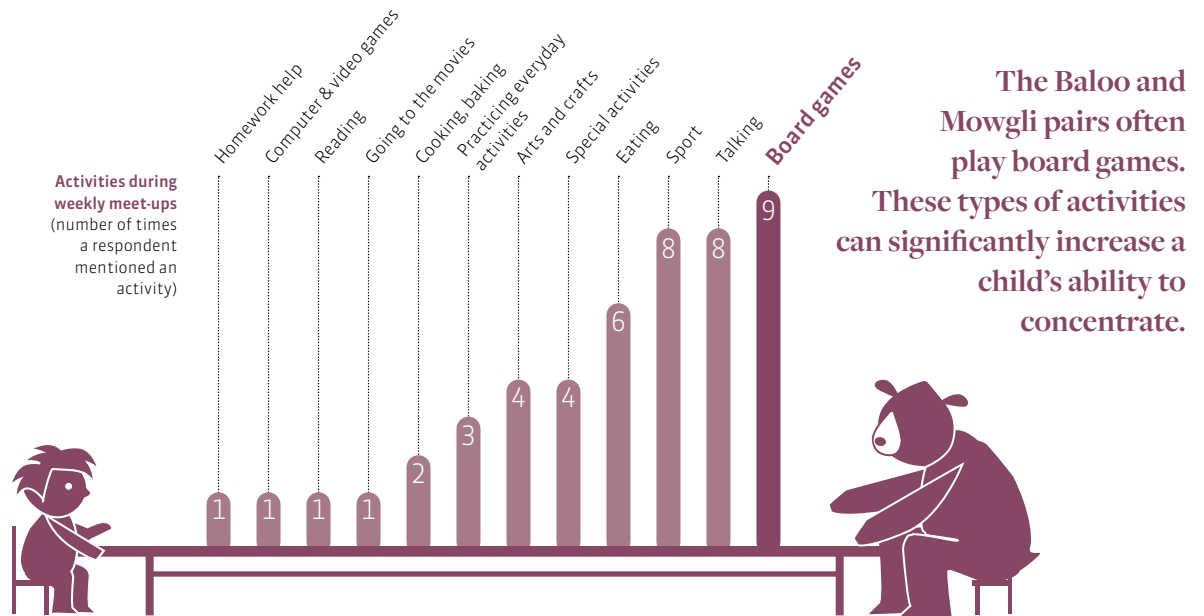
3.3 The impact value chain for Mowglis

Involvement with the mentors can have an effect on Mowglis' lives from a short-term perspective (cf. Fig. 10):

- Thanks to weekly meet-ups with a Baloo, the children **receive 100% individual attention** for several hours each time. For Mowglis, who often come from families with many children, this aspect is particularly special.
- By spending active free time with their friend and companion, Mowglis gather **positive experiences** and **gain more enjoyment of life**.
- Baloos, who most often come from a more educated background, help Mowglis gain **insight into new ways of life**. Whether it be a visit to the zoo, a museum, the Baloo's university, or apartment, these meet-ups show the child there is a plethora of things to discover in the world and provides them with different examples of what adult life can look

like. In some cases, the Baloo may introduce the Mowgli to his or her own family. This allows Mowglis to experience other family circumstances beyond what they are used to at home.

- In most cases, a **friendship** develops between the Baloo and Mowgli over the course of the program. Sometimes, new friendships are also made through interactions with a Baloo's friend, who may join the weekly meet-ups.
- Through the weekly outings, where Mowglis discover new places and take part in fun, recreational activities (walks in the park, swimming, bike riding, etc.), the Mowgli is able to get out of the house and away from the enticing TV or computer to engage in **more physical** (as well as mental) **exercise** (cf. Fig. 11).

Fig. 11 Baloo and Mowgli joint activities – results from an evaluation⁴²

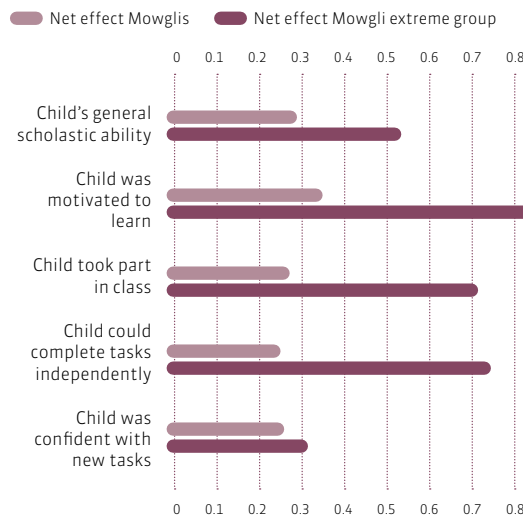
The short-term effects outlined previously can lead to medium-term outcomes for the Mowgli by the end of the program. The following effects may be observed:

- More attention on Mowglis can lead to better self-perception and more self-awareness. The outcome here is a more **realistic self-assessment**.
- Through the positive experiences that Mowglis have with Baloos, such as expressing their creativity with arts and crafts or winning a game, Mowglis develop a **positive attitude towards their own performance** and meet new challenges with more self-confidence.
- The Baloo shows the Mowgli in a playful way that a benevolent attitude towards others can lead to more harmonious and less conflicted interpersonal interactions. Mowglis learn **positive behaviors** that teach them how to interact with others (e.g. classmates) with tolerance and respect.
- Activities, such as day trips, expand the Mowgli's horizons and give them **insight into unfamiliar worlds and people**. This can help Mowglis get to know their own city better and it also introduces them to people who can act as role models.
- These experiences can trigger new **interest and motivation** in young participants. In school, this is observed through an increased willingness to learn by Mowglis (cf. Fig. 12).
- The regular meetings help Mowglis foster **relationship-building** skills. They learn how to gradually get closer to people, open themselves up to others, and gain trust. The structure of the mentoring relationship — with a clear beginning and end — demonstrates that interpersonal relationships may not last “forever” and that sometimes, they are there to serve certain purposes. For many children (especially those who, until now, only knew of family connections and friendships with peers), this can be a new phenomenon.
- The experiences Mowglis have with Baloos promote **physical and mental well-being**. Exercise and outdoor activities with a Baloo helps the Mowgli build physical strength and relieve frustrations, which benefits mental health (cf. Fig. 13).
- In rare cases, Mowglis can experience **feelings of loss** after the program's end. This is why *Balu und Du* tries to make it clear from the start that a Baloo will only be a Mowgli's companion for a limited time-frame. A farewell party can ease the pain of having to say good-bye. After the program has finished, the children still have the option of meeting up with their Baloo — but it is up to them to initiate this. This is another important social competency for them to acquire: maintaining relationships.

⁴² Borrmann, B. et al.: Learning life skills strengthening basic competencies and health-related quality of life of socially disadvantaged elementary school children through the mentoring program “Balu und Du” (“Baloo and you”).

Fig. 12 **Program's effect on motivation to learn and performance in school**⁴³

Questions to teachers in reference to the children's scholastic success and motivation (net effects)

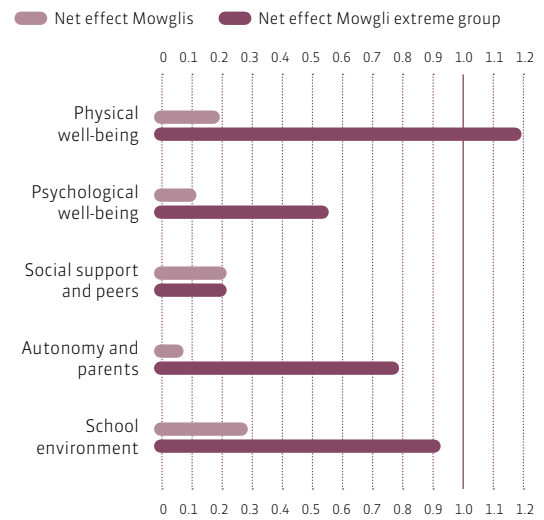


Long-term positive outcomes manifest themselves over a number of years after the completion of the program, particularly during the school or vocational training period:

- Mowglis experience **less stress** because they feel more confident. They can assess their abilities more realistically and develop a more positive attitude towards life.
- Through *Balu und Du*, Mowglis receive attention and understanding from their older companions, experience tolerance and respect for others, and gain insight into other ways of life. Over time, Mowglis develop more **empathy and understanding for other people** and can better engage with peers, teachers and others.
- In this way, Mowglis gradually integrate into society and learn **socially recognized values and norms**.
- An enhanced intellectual curiosity and willingness to learn increases a Mowgli's **ability to concentrate**, which leads to **more success in school**.
- Over the years following the program, Mowglis gain additional experience in building and nurturing relationships and ultimately benefit from a **stronger social network**.
- Mowglis can better handle moments of frustration and disappointment. As result, they exhibit **less aggression, juvenile delinquency, and criminal behavior**.

Fig. 13 **Program's effect on Mowglis' well-being**⁴⁴

Survey of the health-related quality of life of children with the KIDSCREEN test (net effects)



Finally, the long-term outcomes can lead to a significant, positive impact on Mowglis' adult lives:

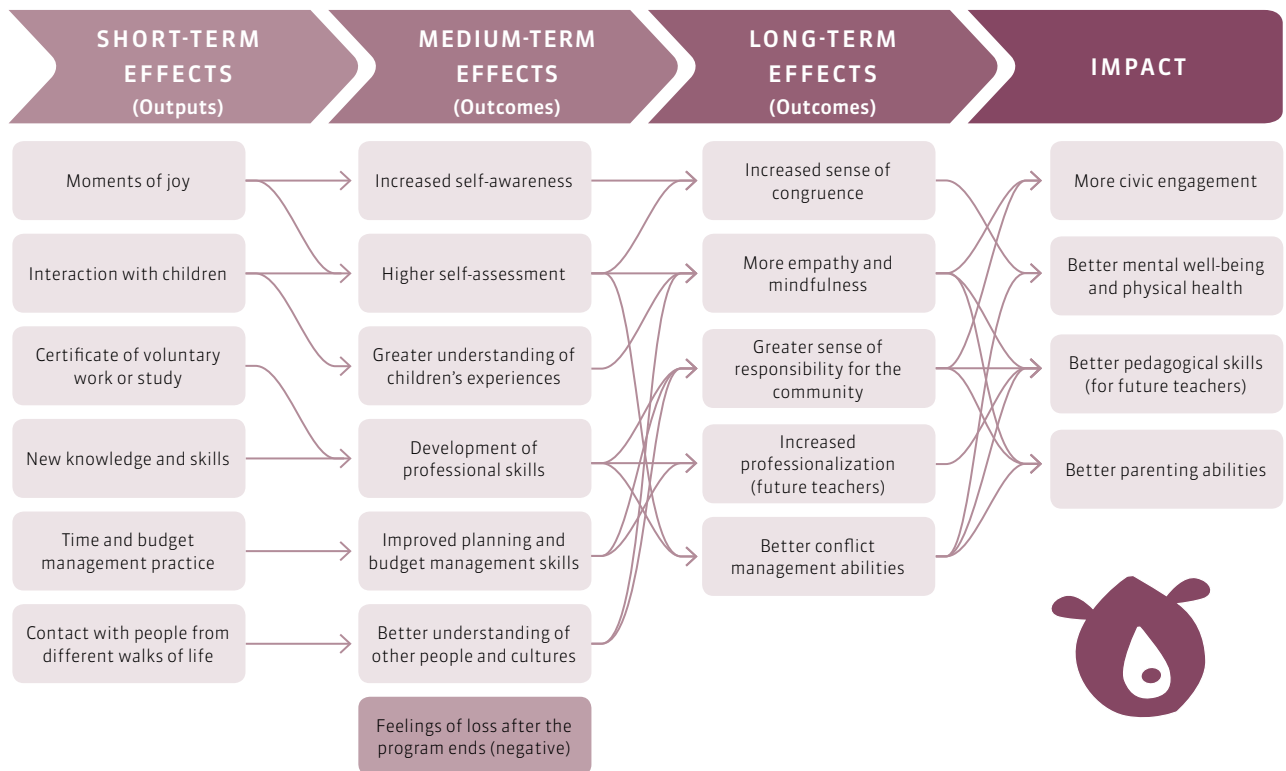
- Their success at school increases the chance for them to achieve a **higher level of education** and secure better job prospects. This integration into society leads to a more positive attitude towards life and professional success.
- They are more likely to assume social responsibility and demonstrate **more civic engagement** through activities such as volunteering for a community organization or helping an elderly neighbor with grocery shopping.
- Mowglis' healthier lifestyles and greater emotional stability contributes to **better mental and physical health**. As a result, former Mowglis may feel more comfortable in their own skin and be less likely to develop addiction problems, depression, and chronic illnesses.

Numerous evaluations, surveys, scientific studies, and pieces of secondary literature provide robust evidence of the aforementioned short-, medium-, and long-term effects, as well as the ultimate impact of mentoring programs (and of *Balu und Du* in particular) (cf. Appendix, Tab. 7 to Tab. 10).

⁴³ Ibid. The "Mowgli extreme group" comprises those Mowglis (approx. 10–15% of all Mowglis) who had particularly poor values in the teachers survey conducted at the start.

⁴⁴ Ibid. The "Mowgli extreme group" comprises those Mowglis (approx. 10–15% of all Mowglis) who had particularly poor results in the KIDSCREEN Test at the start.

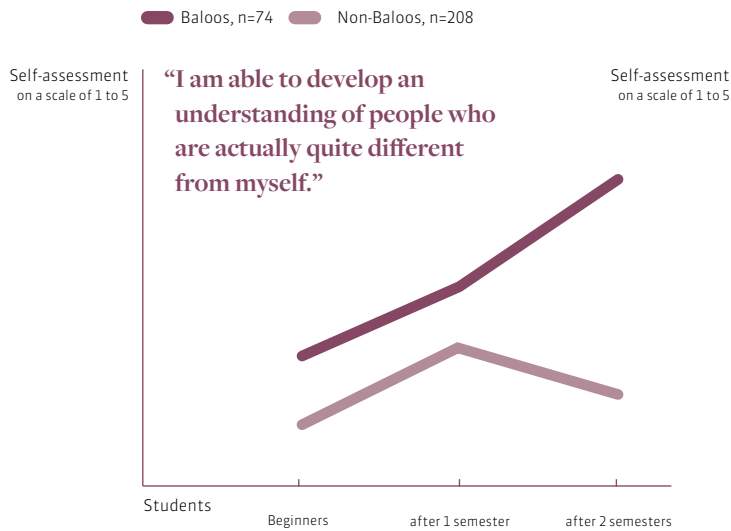
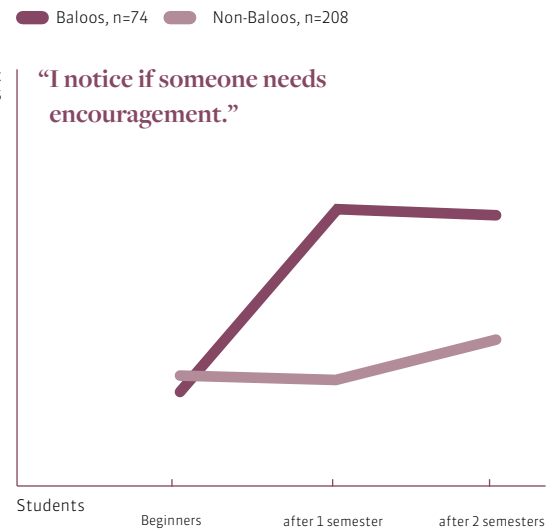
Fig. 14 The impact value chain for Baloos (mentors)



3.4 The impact value chain for Baloos

An impact value chain can also be outlined for Baloos (cf. Fig. 14):

- Through their involvement with the children, Baloos experience **moments of joy**, as they realize how easily they can inspire a child's interest in new things. Over time, this can lead to more **self-awareness** and a **higher assessment of one's own abilities**.
- The regular interaction with children helps Baloos develop a better **understanding of children's experiences**.
- Most Baloos complete the program as part of their studies to become teachers, psychologists, or social workers. The program allows them to apply the methods they learn in university lectures to the real world. At the end of the *Balu und Du* program, they receive a **certificate of voluntary work or study** as proof of their practical qualification. Long-term, this helps the Baloos build key professional competencies for their future careers and sets the course for their **professional development**.
- Baloos organize the activities and content of each meet-up and are also responsible for managing the timing of meet-ups, as well as all financial aspects (Baloos are allocated a maximum monthly budget of 10 euros for activities with Mowglis). In doing so, they learn how to organize activities with a small budget. Over time, this helps develop **planning and budget management skills**.
- One of the most important experiences for Baloos throughout the course of their mentoring is having **contact with people from different walks of life** and cultural backgrounds (33% of Mowglis come from immigrant families). Over time, this helps Baloos develop a **better understanding of other people and cultures** (cf. Fig. 15).
- As is often the case with Mowglis, the adult mentors, who have built close relationships, often miss their Baloos after their year together is over. Evaluations of *Balu und Du* conducted to date have not yet confirmed this effect. However, an analysis of journal entries written by Baloos indicated that some might **experience feelings of loss after the program ends**.

Fig. 15 Program's effect on Baloos' intercultural understanding⁴⁵Fig. 16 Program's effect on Baloos' capacity for empathy⁴⁶

In the long-term, *Balu und Du* can have the following positive effects:

- Baloos develop an **increased sense of congruence** and a deep bond between themselves and society. In this way, they are well prepared for the challenges of adult life.
- They have a higher level of **empathy and mindfulness** when dealing with other people (cf. Fig. 16). They learn to recognize if other people are in need of encouragement.
- The young mentors are more likely to have an **increased sense of responsibility for the community**. They are also more likely to be confident about their career choice (as future teachers, psychologists or social educators), which is positively reinforced through the program (**increased professionalization**).
- They develop **better conflict management abilities** through the diverse interactions they have with Mowglis and their often problematic homes.

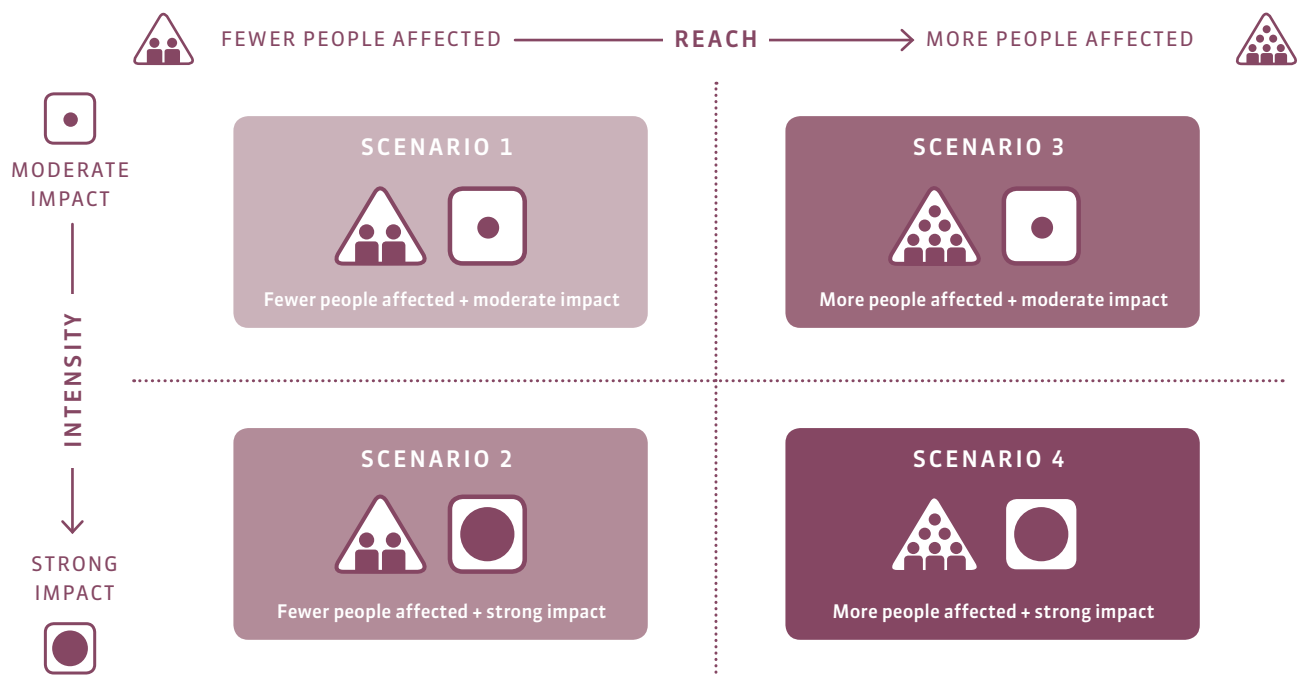
The program can eventually lead to the following profound changes in the Baloos' lives:

- The most important and societally relevant effect of the program is its tendency to create **more civic engagement**, which becomes ingrained in Baloos.
- Their greater sense of congruence between themselves and society helps foster **better mental well-being and physical health** among Baloos.
- The mentors who take on careers as teachers display **better pedagogical skills**, take their work more seriously, and display higher overall levels of motivation and satisfaction with their jobs.
- When Baloos go on to have their own families, they give their children the necessary attention and encouragement they need and have **better overall parenting abilities**.

Numerous academic studies, evaluations and surveys have demonstrated the positive effects mentoring can have on the mentor (cf. Appendix, Tab. 11 to Tab. 14).

⁴⁵ M. Szczesny, et al.: Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden.

⁴⁶ Ibid.

Fig. 17 Four scenarios for calculating the added societal value⁴⁷

3.5 Introduction to calculating the added societal value

Simply listing the positive effects of a mentoring program would come short of demonstrating its societal value. Indeed, the estimated changes brought by the program should be quantified where possible. In the case of *Balu und Du*, the long-term impact of the program until 2071 was estimated using the Mowgli and Baloo cohort from 2012 (cf. impact in Chapters 3.3 and 3.4) and expressed in monetary terms as the added societal value. The impacts monetized not only include the estimated direct effects of the program on Baloos and Mowglis over time, but also the benefits that accrue to the public sector (e.g. through increased tax income) and society in general (e.g. through increased civic engagement).

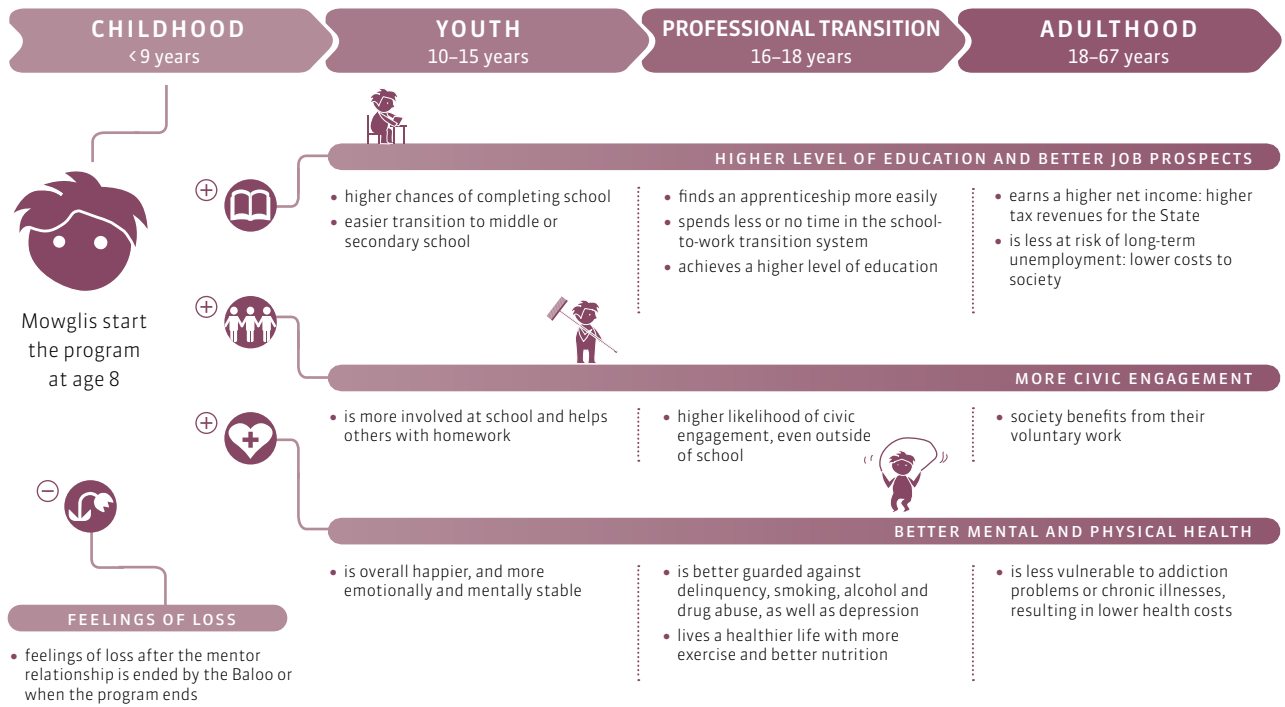
Each quantifiable and monetizable impact was estimated using four scenarios that differ:

- according to the **intensity** of the effect (two levels: moderate/strong), i.e. what degree of improvement occurs; and
- according to the **reach** of the effect (two variations: small/large), i.e. the share of stakeholders that experiences the effect.

In each of the four scenarios, the factors “deadweight” and “attribution” (cf. Fig. 6) were first considered. For some impacts, a “drop-off” factor was also added if the effect is expected to decrease over time.

⁴⁷ After considering deadweight and attribution.

Fig. 18 The Mowgli path

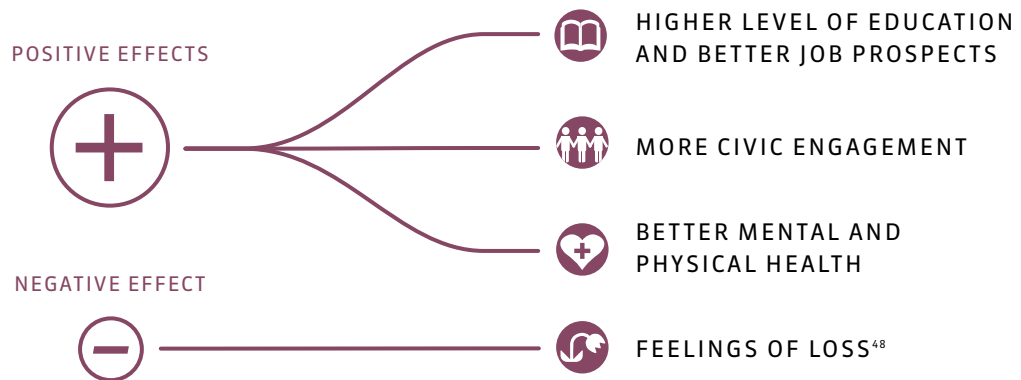


3.6 Calculating the added societal value that results from the Mowglis’ participation

The impact value chain for Mowglis shows how they will experience various positive and negative effects throughout their lives as a result of taking part in *Balu und Du* (cf. Fig. 10 und Fig. 18).

To determine the added societal value from *Balu und Du*, four effects are relevant: three positive and one negative.

Fig. 19 The four relevant effects used to estimate the added societal value of *Balu und Du*



⁴⁸ A possible negative outcome, which is only short-term and rarely occurs, is the disappointment over the program coming to an end and the accompanying feelings of loss.



HIGHER LEVEL OF EDUCATION AND BETTER JOB PROSPECTS

By taking part in *Balu und Du*, Mowglis are able to reach a higher level of education and they have better job prospects. The added societal value can be estimated using the following effects:

- 1 **Fewer Mowglis in the school-to-work transition system** (savings for the public sector)
- 2 **More net income** (additional revenue for former Mowglis)
- 3 **Higher tax revenue** (additional revenue for the public sector)
- 4 **Fewer unemployment benefit (ALG II) claims and social sector expenses** (savings to the public sector)

Academic evaluations carried out on *Balu und Du* have revealed that Mowglis who were not well-off at the start of the program (e.g. those who were poorly engaged in class or had difficulty concentrating) experienced the most significant positive change by the end of the program — more so than Mowglis who started the program in a comparatively better situation.

This significant effect was observed among 10–15% of Mowglis who were examined (the so-called “extreme group”).⁴⁹ Therefore, the SROI analysis used the assumption that only an extreme group of Mowglis embark on a “better path” with regards to school, vocational training and development, and the job market. The range of 10 to 15% was used to establish two scenarios on the **reach** of the program. In the first scenario, where **fewer people are affected**, the extreme group refers to 10% of the 2012 Mowgli cohort. In the second scenario, where **more people are affected**, 15% of the 2012 Mowgli cohort was used.

It can be assumed that the extreme group of Mowglis would normally follow a similar educational and life path to other disadvantaged young people in Germany. However, “disadvantaged young people” is not a precise demographic group for which statistical data currently exists. As a result, a clearly defined social group (people under 18 years old with an immigrant background, which many studies have shown to be “disadvantaged”) was used as an approximation. The Statistisches Bundesamt (Federal Statistical Office of Germany) provides relatively up-to-date and detailed data on the level of education achieved and employment of German citizens according to age group, gender, and immigrant background.⁵⁰ This data was used to predict the changes that will arise in the Mowglis as a result of the mentoring program. The scenarios were designed to illustrate this and each scenario differs in **intensity**:

- **Moderate impact:** Instead of embarking on an academic and professional career that ends with a low level of education, as many children from immigrant families do, Mowglis develop like the (statistically) average young person in Germany.
- **Strong impact:** A Mowgli’s academic and professional career is similar to an average young person without an immigrant background in Germany.

⁴⁹ Evaluations of *Balu und Du* used the term “extreme group” for those Mowglis who received especially poor assessments from teachers at the start of the program. The most statistically significant changes as a result of the program were observed in this group. cf. Müller-Kohlenberg, H.: *Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“*, 12–15.

⁵⁰ Statistisches Bundesamt: *Bevölkerung und Erwerbstätigkeit. Bevölkerung mit Migrationshintergrund – Ergebnisse des Mikrozensus 2011.*

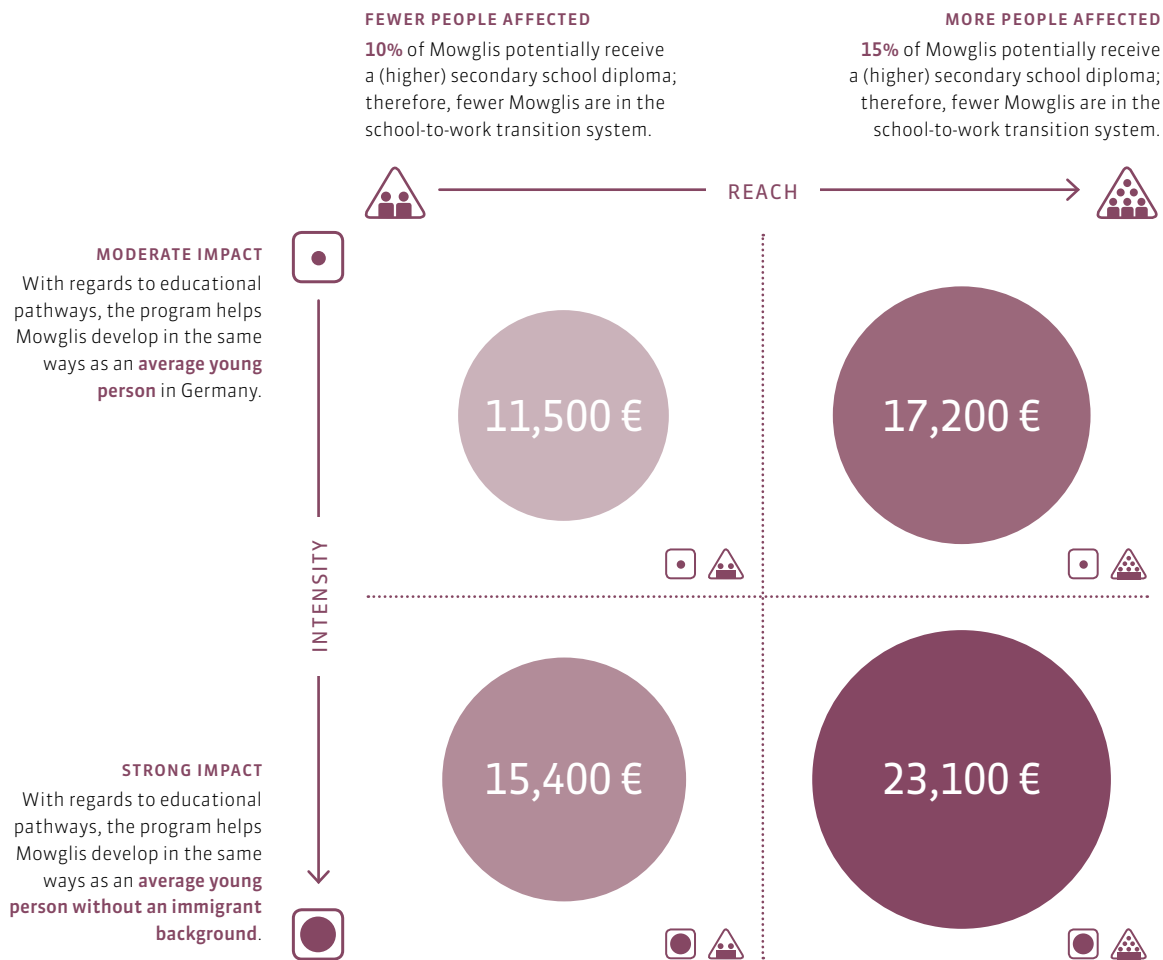


Fig. 20

FEWER MOWGLIS IN THE SCHOOL-TO-WORK TRANSITION SYSTEM⁵¹

Savings to the public sector after deducting deadweight and attribution

In Germany, secondary school dropouts and graduates who have not found an apprenticeship or received a secondary school diploma find themselves in the so-called school-to-work transition system, where the State pays for additional training, coaching and employer matching programs to facilitate their entry into the job market. As a result of the mentoring support provided during elementary school years, the likelihood of Mowglis finishing secondary school, finding an apprenticeship and receiving a higher secondary school diploma increases. Hence, they are less likely to land in the school-to-work transition system, leading to savings for the public sector:



Calculation basis:

- The annual average cost for one young person without an apprenticeship who is in the school-to-work transition system amounted to 10,050 euros in 2006.⁵²
- A total of 14 to 29 months in the school-to-work transition system were saved as a result of less school dropouts and more graduates. The costs of this were offset in the year 2020.
- The calculation is based on assumptions concerning the duration and “cluster type” of young people and adolescents in the school-to-work transition system, which are listed in Tab. 16 (in the Appendix).

⁵¹ The school-to-work transition system refers to, in this context, a set of one-year educational programs in Germany (the basic vocational training year, the pre-vocational training year, and the career entry year), which are, following general schooling, intended to successfully prepare adolescents for an apprenticeship and facilitate the transition to vocational training in the German dual education system. They are compulsory for all school graduates — particularly for students who have completed lower secondary-level schooling, students with and without a diploma, those who have not found an apprenticeship or vocational training course, and those who have not yet completed the compulsory level of schooling. Important providers of the school-to-work transition system are vocational schools, private providers, and the German Federal Employment Agency. See also: <http://www.bildungsexperten.net/wissen/uebergangssysteme-die-alternative-zum-ausbildungsplatz/>.

⁵² Aufstieg durch (Aus-)Bildung – der schwierige Weg zum Azubi, 132.

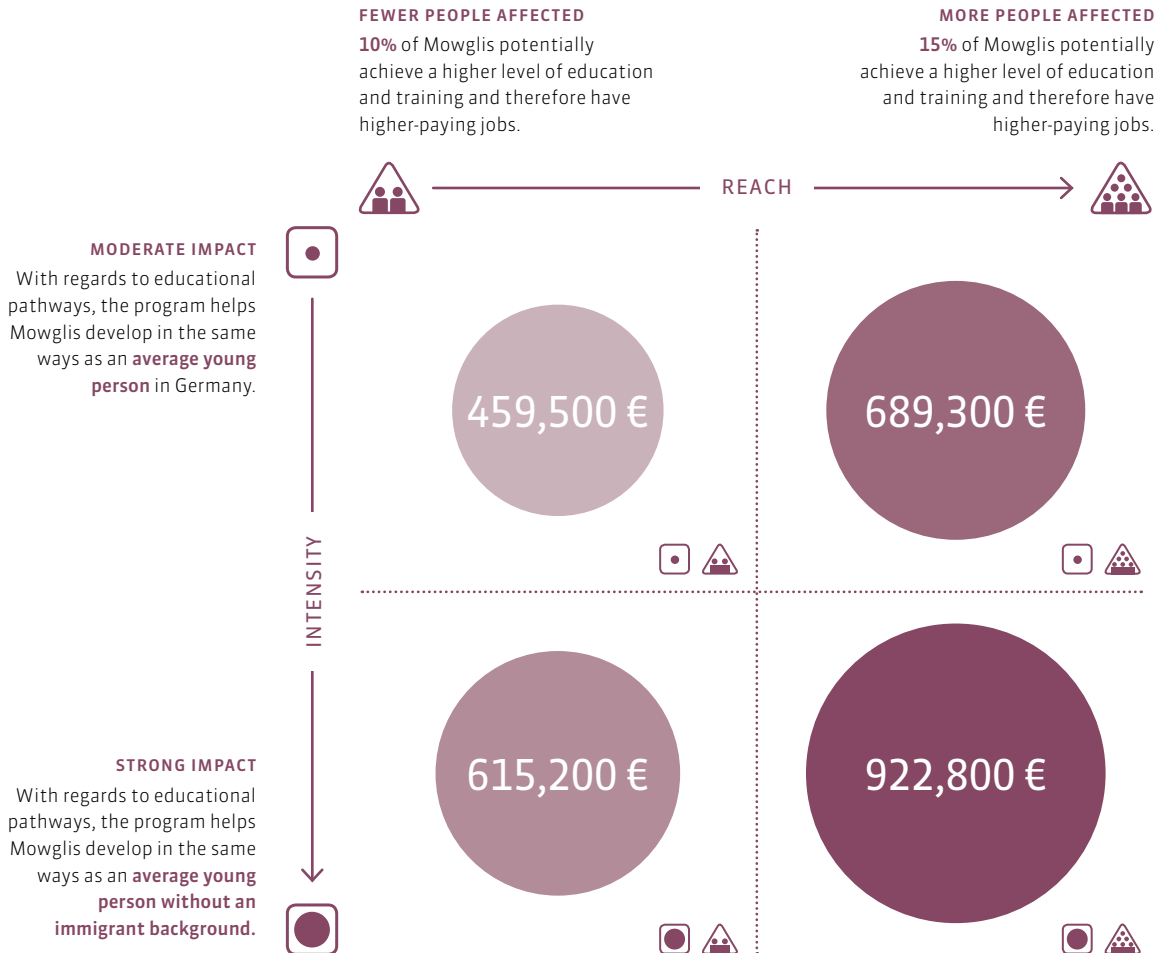


Fig. 21

MORE NET INCOME

Additional revenue for former Mowglis after deducting deadweight and attribution

Completing secondary school or university studies improves job prospects, as well as the chance of a higher annual net income.



Calculation basis:

- Given that the 2012 cohort is made up of 53% male and 47% female Mowglis, the various gross incomes by educational level and gender form the basis of the calculation (cf. Tab. 18 in the Appendix).
- At the start, the effect is negative — each Mowgli who is undertaking vocational training or completing their studies will, at first, earn less or not be gainfully employed. These losses were factored into the SROI calculation. Subsequently, a positive effect on disposable income arises from the increased earning capacity that can immediately result from finishing studies or vocational training.
- A shrinking labor market (skills shortage) has been factored into the calculation. This means that the higher rate of employment for Mowglis does not take away jobs from other workers.

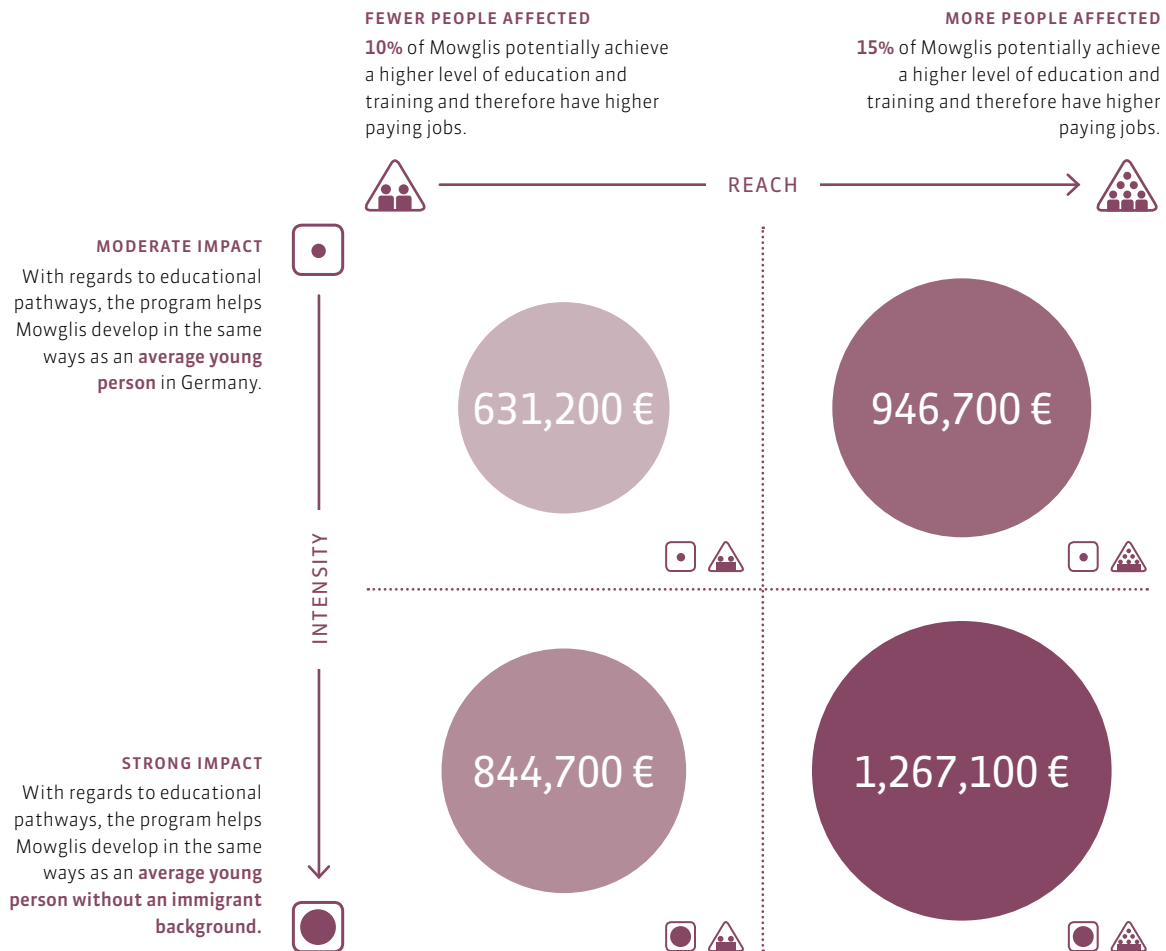


Fig. 22

HIGHER TAX REVENUE

Additional revenue for the public sector after deducting deadweight and attribution

Mowglis' higher incomes have positive effects on the public funding situation, as the State obtains more tax and social security contributions. This positive return benefits society as a whole.



Calculation basis:

- For this calculation, the same income figures from the net income effect were used as a basis (cf. Tab 18. in the Appendix) to calculate 2014 income tax, solidarity surcharges, state health, nursing, pension, and unemployment insurance contributions—all revenue for the State.
- The church tax is not a supplement to the State; it was regarded as free disposable income from the Mowglis.

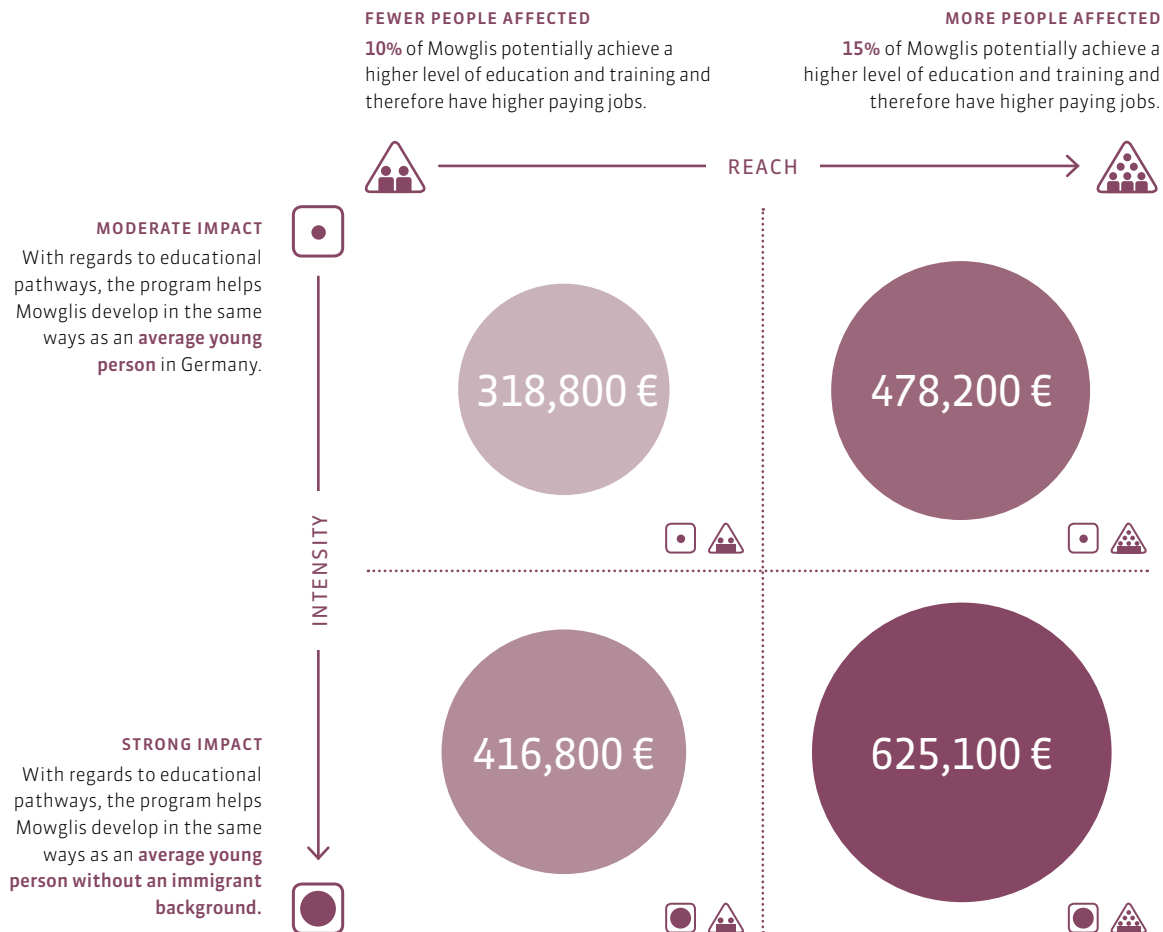


Fig. 23

FEWER UNEMPLOYMENT BENEFIT (ALG II) CLAIMS AND SOCIAL SECURITY EXPENSES⁵³

Savings to the public sector after deducting deadweight and attribution

Getting a good education generally leads to less (long-term) unemployment, which has a positive effect on the State not only through higher tax revenues, but also via savings from lower unemployment benefits being paid out and decreased social welfare costs. Former Mowglis who are gainfully employed do not live from State-funded support services, and this leads to quantifiable savings.



Calculation basis:

- When calculating these figures, the total expenses for Hartz IV (Germany's unemployment benefit program ALG II, combined with a social allowance) in the year 2012⁵⁴ were divided among the estimated number of recipients⁵⁵ to calculate the average costs per social welfare recipient. These costs amount to 9,833.13 euros and form the calculation basis for annual costs per Hartz IV recipient.
- The proportion of estimated Hartz IV recipients was calculated using data from the Statistisches Bundesamt (Federal Statistical Office of Germany). As part of this, the 35–45 age group was used across all years until retirement in order to be as conservative as possible (cf. Tab. 17 in the Appendix). The calculation of Hartz IV savings starts in the year 2029, when the Mowglis turn 25 and are entitled to receive social benefits. Potential savings in terms of Hartz IV payments are not made to parents of Mowglis. Additionally, gainful employment prior to age 25 was not factored in to ensure a conservative estimate of savings to the State.

⁵³ Germany's unemployment benefit type II (ALG II) is a social benefit incorporated into Germany's Social Code II (Sozialgesetzbuch – SGB II) for people who are able to work; the social allowance (Sozialgeld) is for people who are unable to work, see: <http://www.hartziv.org/sozialgeld.html>.

⁵⁴ Bremer Institut für Arbeitsmarktforschung und Jugendberufshilfe (BIAJ): Hartz IV-Ausgaben des Bundes 2012.

⁵⁵ Statistisches Bundesamt: Bevölkerung und Erwerbstätigkeit. Bevölkerung mit Migrationshintergrund – Ergebnisse des Mikrozensus 2011.

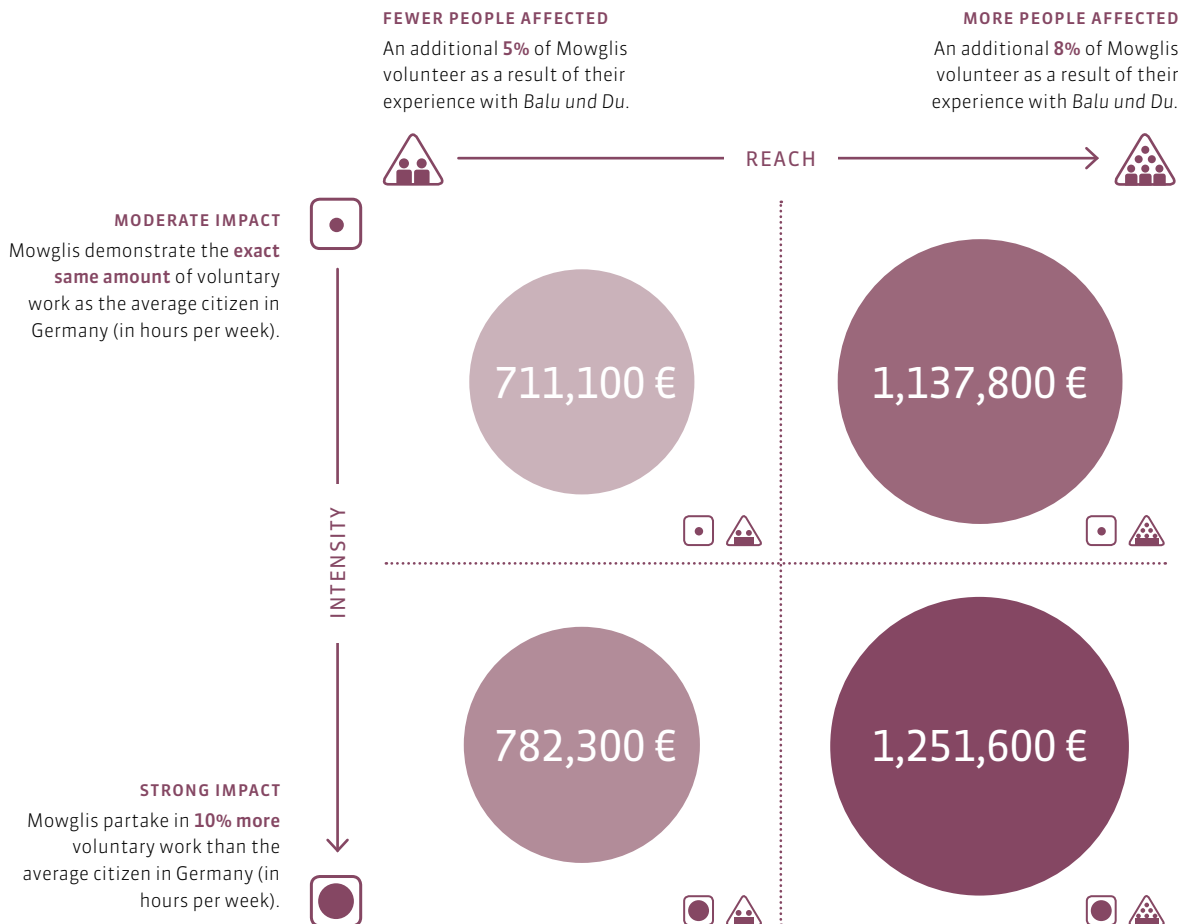


Fig. 24

MORE CIVIC ENGAGEMENT

Additional revenues for the public sector after deducting deadweight and attribution

In a survey of former Mowglis conducted in July 2014, 66% confirmed that they were either currently or previously engaged in voluntary work. More specifically, 56% stated their participation in *Balu und Du* inspired them to undertake voluntary work as adults. On average, 36% of the population in Germany age 14 or over volunteers for around 2.8 hours per week.⁵⁶ This means that *Balu und Du* has a strong, positive effect on future voluntary commitment among Mowglis.



Calculation basis:

- The added societal value of additional civic engagement was only calculated until the Mowglis reach the age of 67, even though many people continue to volunteer after retiring.
- There are very conservative assumptions behind this approach: Between 5 and 8 percent of the cohort from 2012 were recorded as part of the calculation (this equates to around 37 to 59 Mowglis who undertake extra voluntary work). Furthermore, the average intensity of voluntary commitment was estimated to be only 10% higher than the average for the German population in the “strong effect” category. The actual hourly rate of a social worker was not used. Instead, a lower hourly salary of 8 euros⁵⁷ was applied.
- A time-based drop-off factor was considered, meaning the effect of the program reduced in percentage over time. For example, in 2067 only 40% of the original effect is predicted.

⁵⁶ Ernste, D. et al.: Erster Engagementbericht 2010. Für eine Kultur der Mitverantwortung, 11, 15.

⁵⁷ Klie, T. et al.: Untersuchung zur Monetarisierung von Ehrenamt und Bürgerschaftlichem Engagement in Baden-Württemberg, 45.



BETTER MENTAL AND PHYSICAL HEALTH

Scientific studies have shown that people who experience stable relationships with adult caregivers during childhood develop a more pronounced sense of congruence in adulthood and are mentally stronger.⁵⁸ These people are less vulnerable to addiction,⁵⁹ (particularly alcohol dependency) and psychogenic illnesses such as depression. Additionally, their overall physical health is better. Long-term, this takes the form of a healthier lifestyle, fewer chronic illnesses, and a higher quality of life.⁶⁰ Improved mental and physical health means savings for the individual, as well as for society as a whole. In this SROI calculation, savings to the health sector were monetized with three specific health impacts:

- 1. Fewer addiction problems**
(savings to the health system)
- 2. Lower risk of depression**
(savings to the health system)
- 3. Healthier lifestyles**
(savings to the health system)

The added value for the Mowglis, which is gained through better physical and mental well-being, was not monetized, as expressing this gain in quality of life through a monetary value proved to be too difficult.⁶¹

Scientific studies have shown that people who experience stable relationships with adult caregivers during childhood develop a pronounced sense of congruence in adulthood and are mentally stronger.

⁵⁸ Bundeszentrale für gesundheitliche Aufklärung: Was erhält Menschen gesund? Antonovskys Modell der Salutogenese – Diskussionsstand und Stellenwert.

⁵⁹ Maggs, J. L. et al.: Childhood and adolescent predictors of alcohol use and problems in adolescence and adulthood in the National Child Development Study.

⁶⁰ Power, C. und Matthews, S.: Origins of health inequalities in a national population sample.

⁶¹ It would be risky to take the added value for the Mowgli into account twice, given that the positive income effect for Mowglis—which can be attributed to improved mental and physical well-being—has already been calculated (cf. Tab. 6).

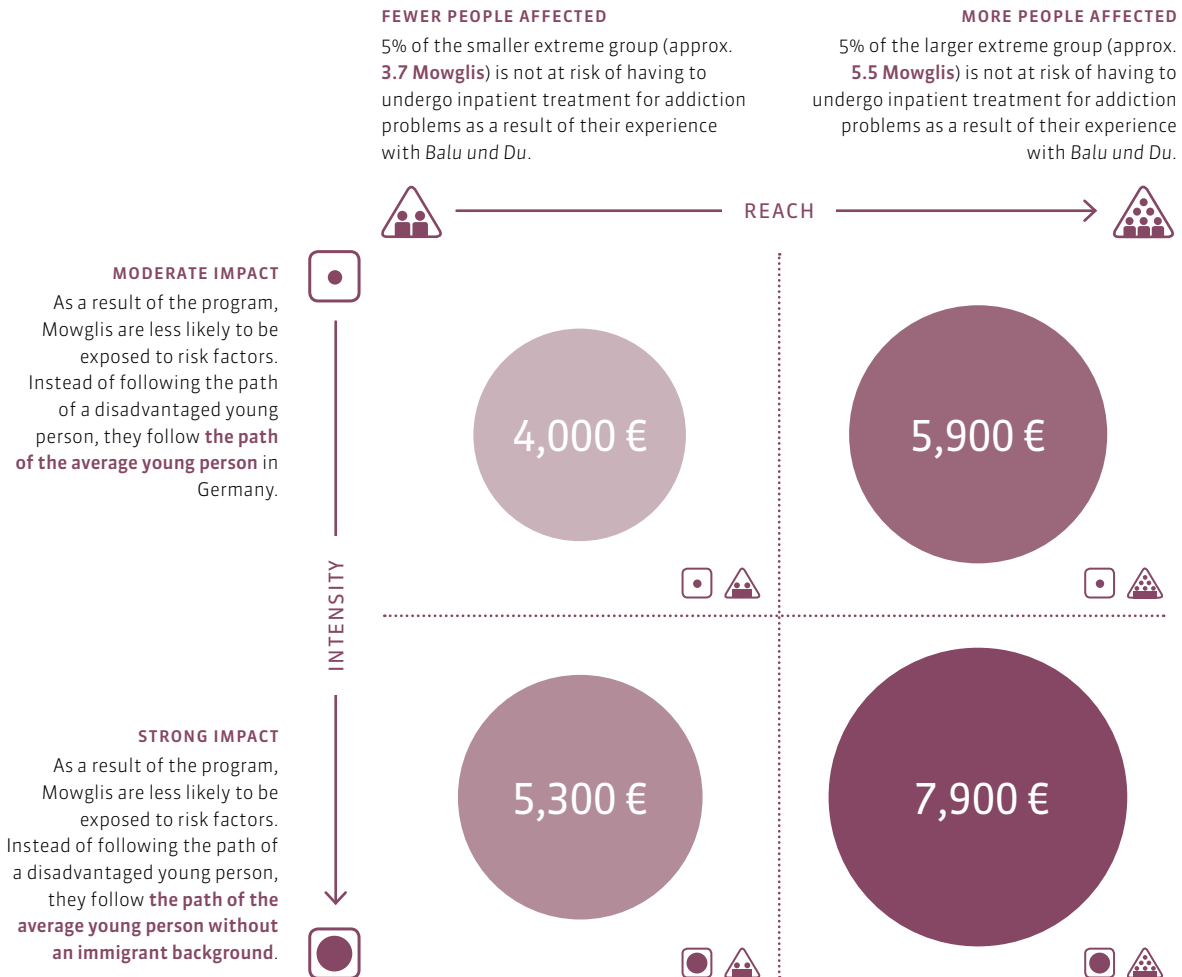


Fig. 25

FEWER ADDICTION PROBLEMS

Savings to the health system after deducting deadweight and attribution

Multiple risk factors can influence addiction problems later on. The crucial elements are the environment a child grows up in, as well as the school they attend. The basis for calculating societal benefits was done using the number of Mowglis from the 2012 cohort whose educational pathways were likely to improve as a result of taking part in the mentoring program.



Calculation basis:

- The prevalence of alcohol or drug dependency among the population in Germany was estimated to be 5%.⁶²
- The duration of the average inpatient treatment for addiction problems was set at four months.⁶³
- The inpatient treatment costs for addiction problems was estimated at around 19,000 euros.⁶⁴
- The costs were calculated as a one-off for the year when the 2012 Mowgli cohort will reach age 35 (in 2039). This is the average age when people receive inpatient treatment for drug and alcohol problems.⁶⁵

⁶² Kielstein, V.: Wie viel kostet Alkoholismus? – Volkswirtschaftliche Betrachtung – Therapie und Rehabilitation.

⁶³ Kreuzbund: Das Suchtproblem in Deutschland.

⁶⁴ Kielstein, V.: Wie viel kostet Alkoholismus? – Volkswirtschaftliche Betrachtung – Therapie und Rehabilitation.

⁶⁵ Kreuzbund: Das Suchtproblem in Deutschland.

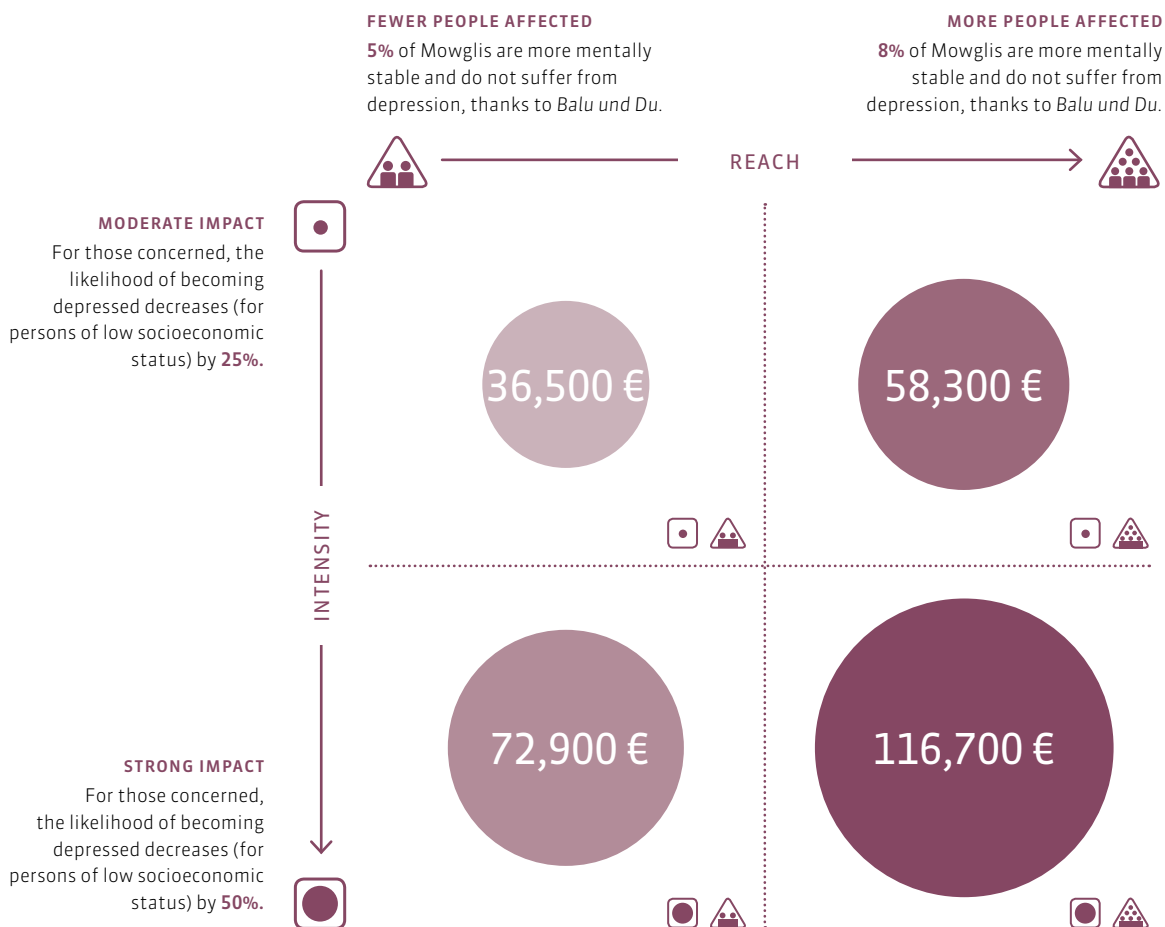


Fig. 26

LOWER RISK OF DEPRESSION

Savings to the health system after deducting deadweight and attribution

Evaluations of *Balu und Du* have demonstrated that after the program has come to an end, an extreme group of Mowglis were more resilient and showed an improved state of mental health. This can have long-term positive outcomes not only for the health system, but also for future employers, who can expect lower rates of absenteeism at work. Studies have shown that people with a low socioeconomic status are twice as likely to suffer from depression than the average person.⁶⁶ If the mentoring program *Balu und Du* demonstrably helps children develop mental stability in a way that is on par with the average population, then the cost savings can also be monetized. In the current analysis, only the estimated healthcare savings were quantified and monetized. The impact on the labor market (sick leave, etc.) was excluded.⁶⁷



Calculation basis:

- The study estimated that the proportion of Mowglis who would suffer from depression had they not taken part in *Balu und Du* would be twice that of the average population, since a lower socioeconomic status was assumed in these cases.⁶⁸
- The average proportion of the German population with depression was used as a basis (8.3%).⁶⁹ Average health costs for depression per person per year amount to 839.50 euros.⁷⁰ The value is low because a large number of people who suffer from this illness never get treatment.

⁶⁶ Psychotherapeutenkammer NRW: Zahlen & Fakten: Depression.

⁶⁷ The reasons for this are better job prospects, which have already been taken into account.

⁶⁸ Psychotherapeutenkammer NRW: Zahlen & Fakten: Depression.

⁶⁹ Ibid.

⁷⁰ Expressed in the euro value from 2014 and based on the costs from the year 2008, taking into account an inflation rate of 1.5%. cf. Statistisches Bundesamt: Gesundheitsausgaben 2012 übersteigen 300 Milliarden Euro.

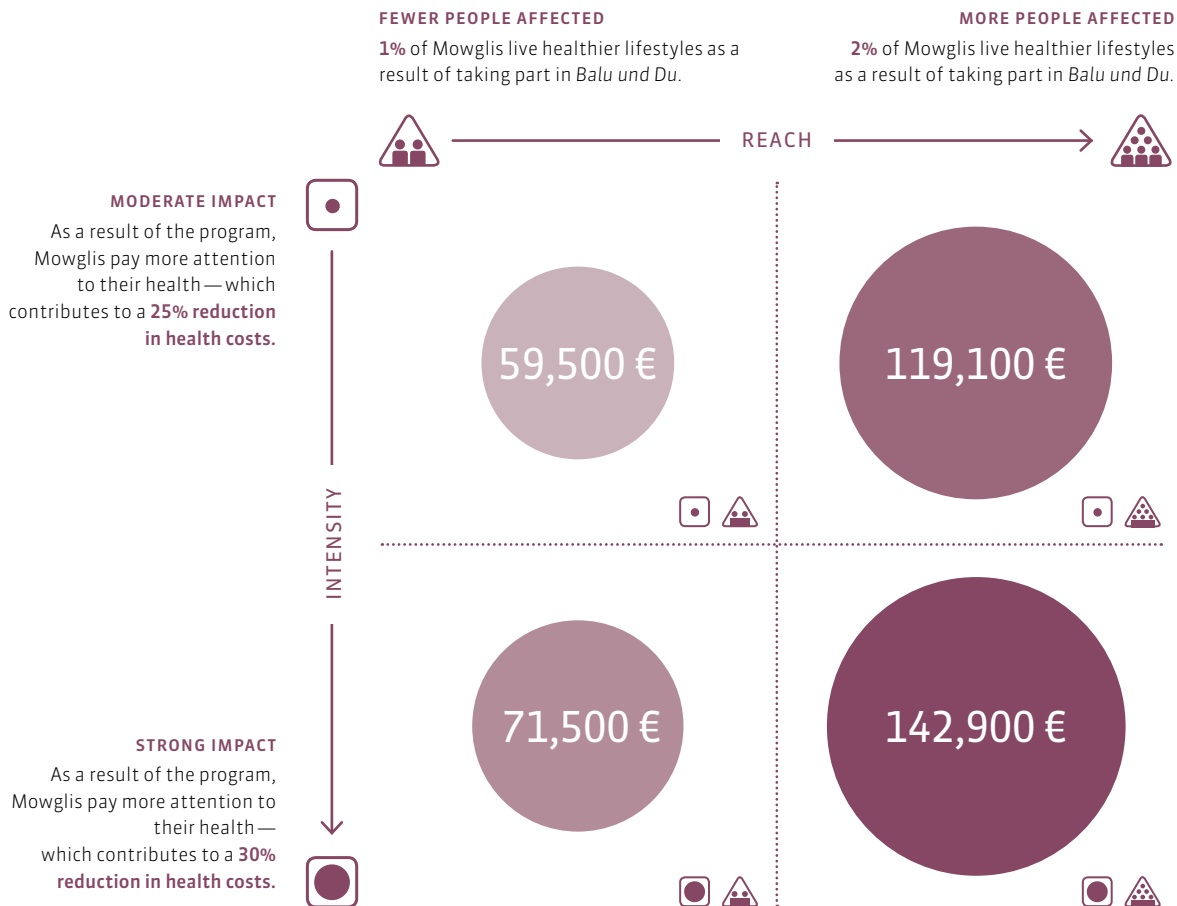


Fig. 27

HEALTHIER LIFESTYLES

Savings to the health system after deducting deadweight and attribution

Balu und Du is a primary prevention program (cf. Chapter 1.2). It helps young participants build and lead healthier lifestyles from an early age. Multiple studies demonstrate that a more balanced lifestyle leads to long-term, positive health outcomes in adolescence and young adulthood, including better nutrition, less consumption of tobacco and alcohol, and more exercise. This lowers the risk of heart disease, lung cancer, diabetes, and high blood pressure.⁷¹



Calculation basis:

- The average health costs per person per year were estimated at 3,850 euros (based on expenses from the year 2012 with a 1.5% inflation rate). Once the Mowglis reach 60 years of age, the costs rise by about 50%.⁷²
- According to several sources, potential savings from preventive measures in the German healthcare system are between 25–30%.⁷³
- The savings were calculated starting at the age of 40, since most chronic illnesses occur from this point onwards.⁷⁴ As with all areas of impact, the monetary values were taken into account up to the age of 67.

⁷¹ Walter, J.: Verhaltensprävention: ein Weg zur Kostendämpfung im Gesundheitswesen?, 711–716.

⁷² Statistisches Bundesamt: Gesundheitsausgaben 2012 übersteigen 300 Milliarden Euro.

⁷³ Fietz, M.: Koalition will Übergewicht den Kampf ansagen; Deutsche Gesellschaft für Zahn-, Mund- und Kieferheilkunde (DGZMK) e. V.: Falsche Versorgung und Mangel an Prävention belasten das Gesundheitswesen jährlich mit Milliardensummen.

⁷⁴ Sommer, K.: Lungenkrebs – eine immer häufiger vorkommende Krebserkrankung; Levecke, B.: Diabetes Typ 2 ohne Medikamente behandeln; Deutsches Grünes Kreuz (DGK) e. V.: Bluthochdruck im Alter

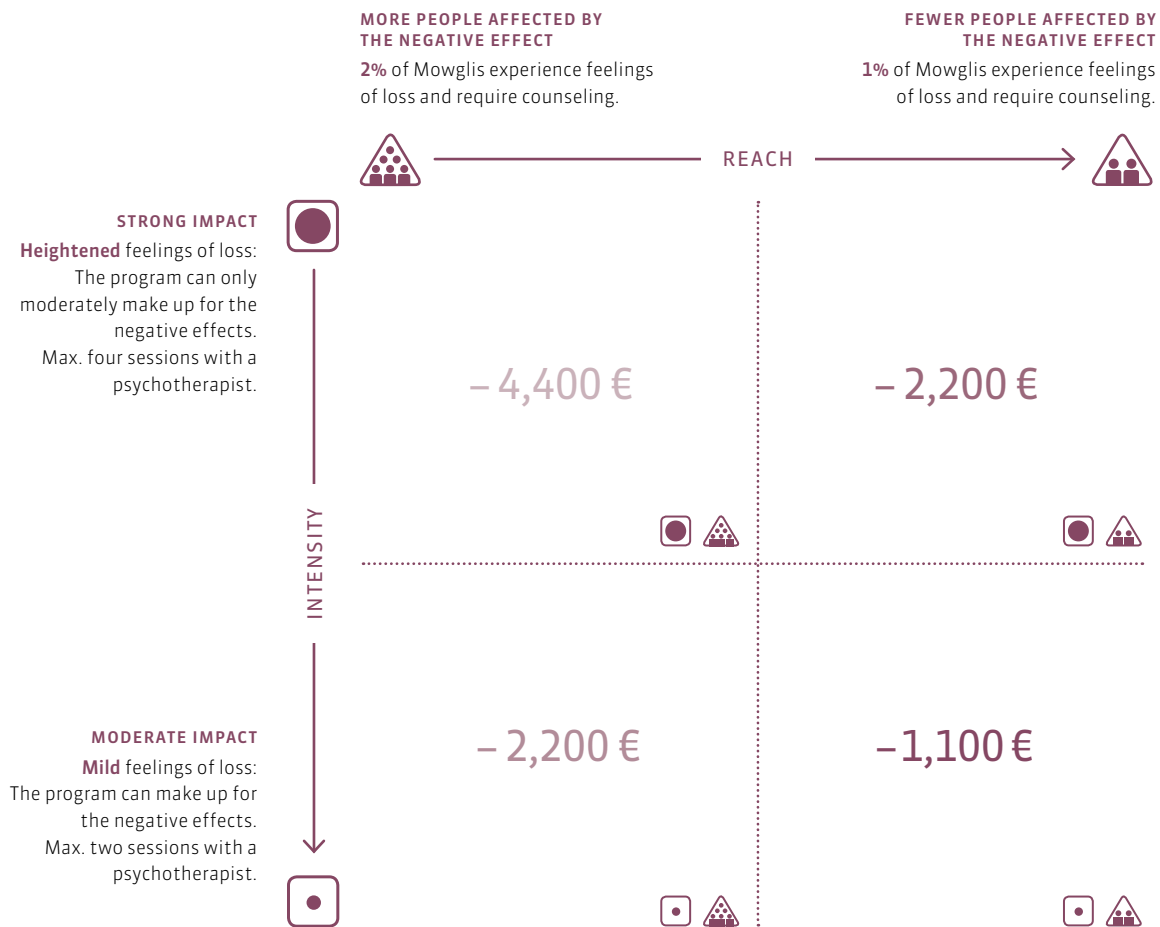


Fig. 28

FEELINGS OF LOSS

Additional costs for Mowglis or their parents after deducting deadweight and attribution

The single negative outcome that was observed in the Mowgli parent reports⁷⁵ was a feeling of loss that can occur among the child participants. The cause of this can be attributed to the program coming to an end, or a Baloo terminating the companionship prior to the end of the program's official duration. Even an unreliable mentor who cancels meetings on short notice can trigger these kinds of feelings. While scientific evaluations of *Balu und Du* have not determined any acute feelings of loss as a result of the program coming to an end, they have been factored into this SROI analysis in the form of counseling sessions with a psychotherapist—especially since similar studies on mentoring programs have encountered this phenomenon.⁷⁶



Calculation basis:

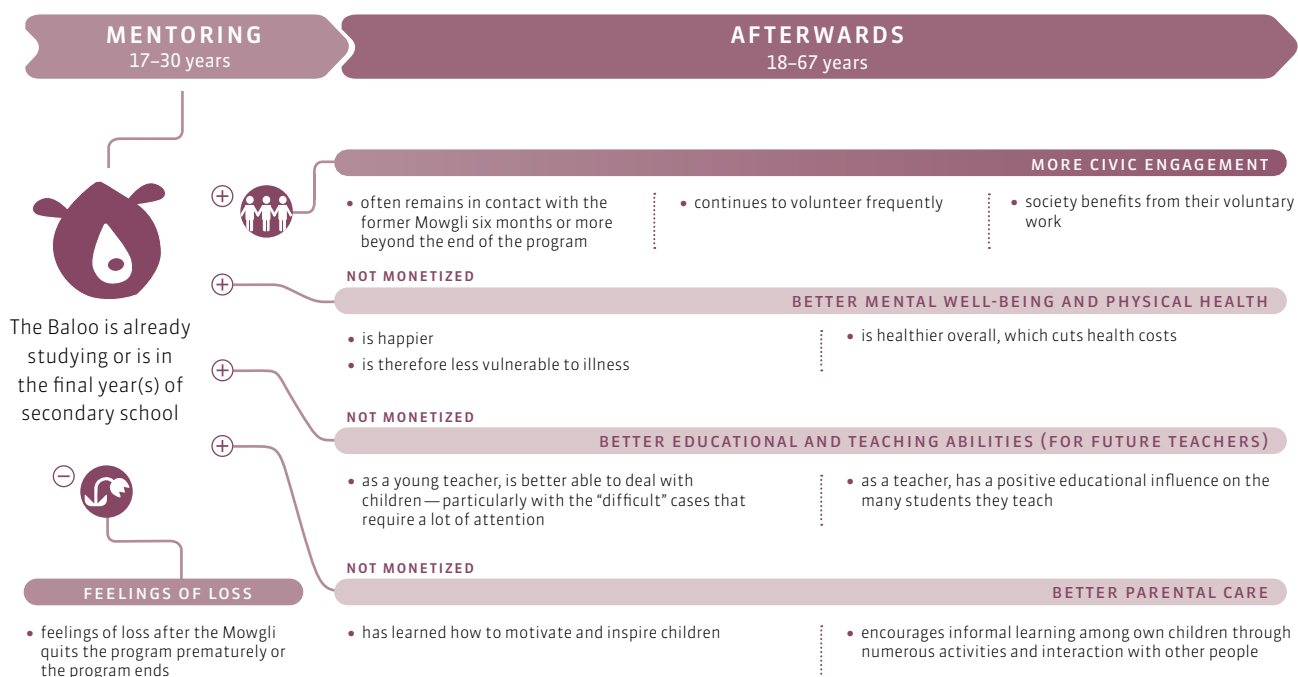
- The cost of psychological counseling sessions was used as a monetary approximation of value (determined at 75 euros per session).⁷⁷ In most cases, it was assumed that these costs are not covered by health insurers and therefore must be taken on by Mowglis' parents.
- Such feelings of disappointment tend to appear for only a short amount of time, thus the calculation here has been made for no longer than one year.

⁷⁵ Weniger, C.: Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogrammes „Balu und Du“ im Spiegel von Lehrerurteilen, 12.

⁷⁶ Tierney, J. und Grossmann, J.: Making a Difference – An Impact Study of Big Brothers Big Sisters, 30.

⁷⁷ This is in line with the average cost of a 45–50-minute session with a psychotherapist in the year 2013.

Fig. 29 The Baloo path



3.7 Calculating the added societal value that results from Baloos’ participation

The impact value chain in Fig. 14 illustrates how the path of a Baloo can change. Baloos also experience positive and, to a lesser extent, negative changes after participating in *Balu und Du* (cf. Fig. 29). However, many of the projected effects are hard to estimate and therefore difficult to monetize. One example of this is the assumption that former Baloos will become better educators, caregivers, or teachers. These kinds of changes are also influenced by other experiences with children (e.g. internships or babysitting). The same is true of the influence on parental care. To date, no evaluations have thoroughly examined the *Balu und Du* program for its potential impacts on Baloos’ future teaching and parenting abilities. For this reason, these effects were excluded from the SROI calculation.

Studies have shown that volunteering can positively influence a mentor’s physical and mental state.⁷⁸ However, no such study has been done with former *Balu und Du* mentors. Since potential savings to the health system would have been projected on a hypothetical basis, it was considered more prudent not to reflect this potentially positive effect in the SROI analysis.

As a result, only two relevant areas of impact were considered in the SROI calculation for the Baloo stakeholder group: the increased civic engagement of the Baloos, which was also documented in the long-term study on the sustained impact of *Balu und Du*,⁷⁹ and the emotional involvement or negative effect of ending the mentoring relationship (comparable to the Mowglis’ development).

⁷⁸ Die Welt online: Wer anderen selbstlos hilft, hält sein Herz gesund.

⁷⁹ Bartl, H. et al.: Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“.

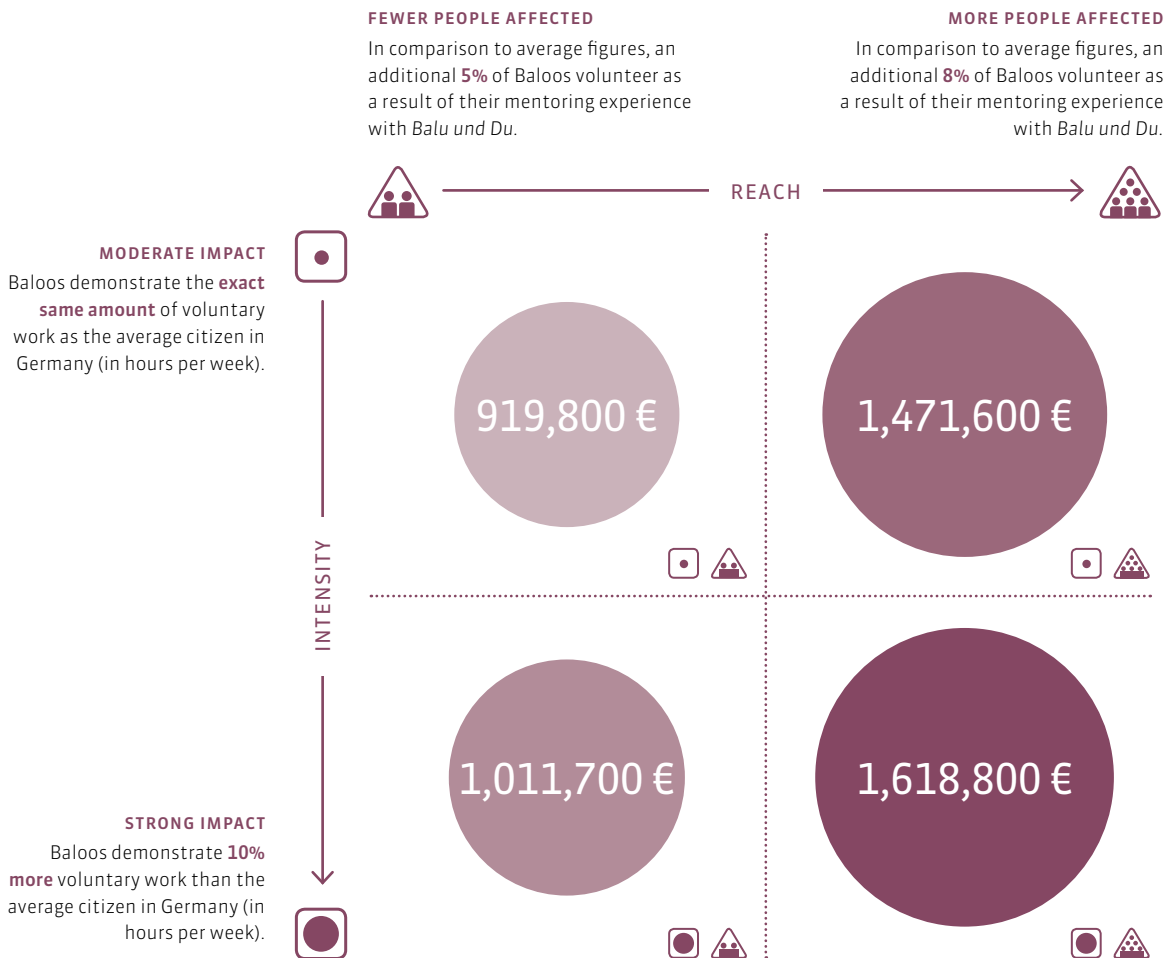


Fig. 30

MORE CIVIC ENGAGEMENT

Added societal value after deducting deadweight and attribution

For adult mentors, participating in *Balu und Du* generally contributes to volunteer involvement throughout their lives. The 2012 study on the sustained impact of the program demonstrated that more than 50% of Baloos maintain a relationship with their Mowgli even six months after the completion of the program.⁸⁰ The authors of the study tried to contact all Baloos who have been involved since 2002. 20% of those who had taken part in the program a decade earlier responded to the authors' questions. This alone is evidence of a high level of commitment. Some of the former Baloos have since set up new *Balu und Du* program locations, work for *Balu und Du* voluntarily as location coordinators, or work in the Cologne office. Nonetheless, the positive effect on Baloos was conservatively estimated.



Calculation basis:

- An honorary rate of 8 euros per hour was also applied here.⁸¹ The effect was only considered until Baloos reach the official retirement age of 67 (up to 2061), even though many people spend more time volunteering throughout retirement.
- Once again, a drop-off factor reduces the effect of the program on voluntary commitment over five-year increments from 2023 onwards (100% down to 30% in year 2061).

⁸⁰ Ibid., 5.

⁸¹ Klie, T. et al.: Untersuchung zur Monetarisierung von Ehrenamt und Bürgerschaftlichem Engagement in Baden-Württemberg, 45.

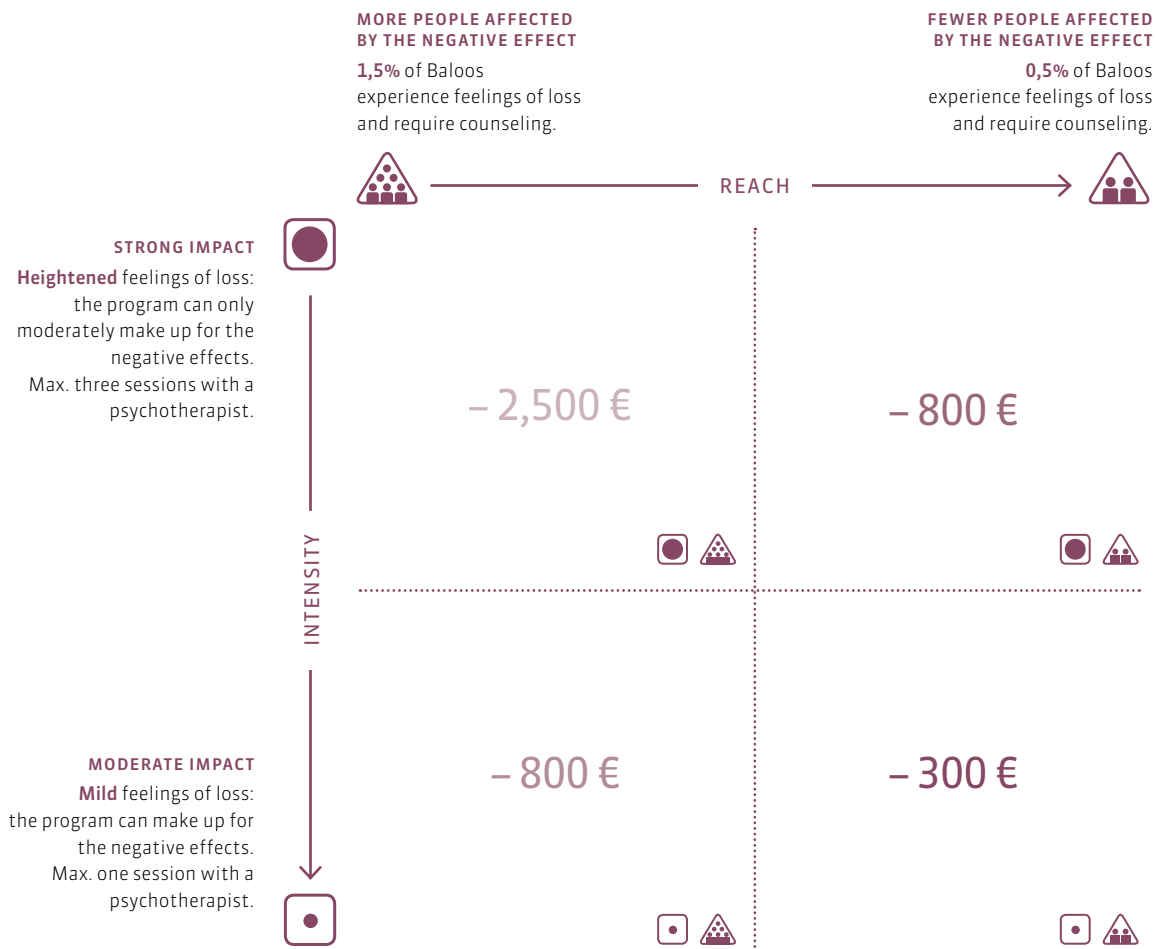


Fig. 31

FEELINGS OF LOSS

Additional costs for Baloos or their parents after deducting deadweight and attribution

Dealing with a child from a difficult family situation can become a burden for the mentor. The weekly seminars offered throughout the mentoring year are designed to help Baloos process these feelings. This is why Baloos continue to be invited to the support sessions if they are still meeting up with their Mowgli after the program has ended. Any costs incurred continue to be reimbursed (within the budgetary limit set at 10 euros per month) and Baloos continue to be insured via *Balu und Du*. However, there are less positive cases that some mentors may need to face—more specifically, cases where the elementary school child in question does not want to maintain contact. As a result, Baloos can experience feelings of disappointment and loss. While none of these negative feelings have been officially evaluated in a study of the program, they were brought up anecdotally by the Baloos, which is why this outcome has been included in the calculation.

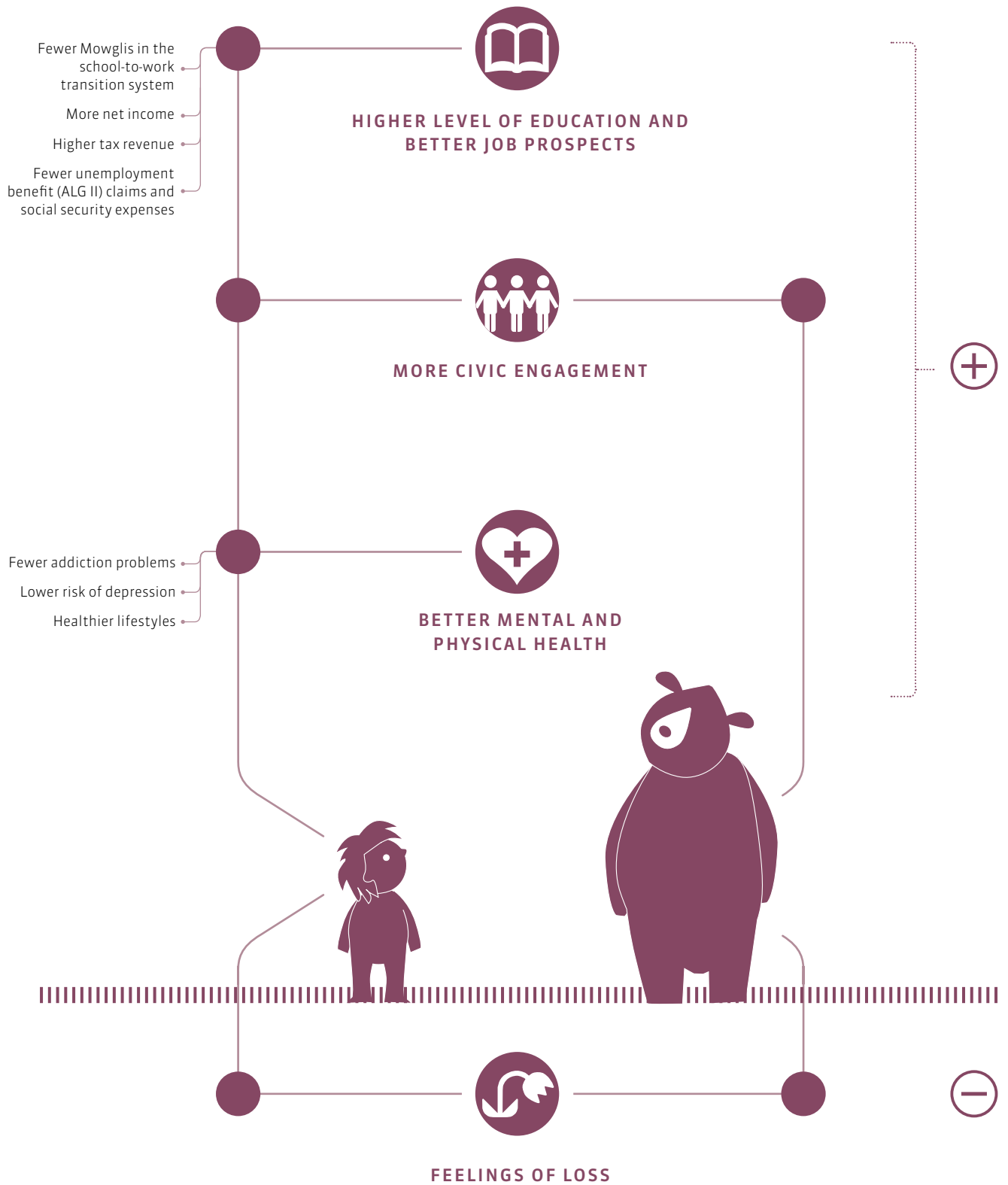


Calculation basis:

- As with the Mowglis, the counseling sessions represent the monetary approximation of the cost of feelings of loss.
- In this instance, it has also been assumed that the costs are not covered by health insurers and are therefore taken on by Baloos.
- As with the Mowglis, the costs were calculated based on the cost of an average therapy session (75 euros per session for the 12-month period following the completion of the program.⁸²

⁸² This is in line with the average cost of a 45–50-minute session with a psychotherapist in the year 2013.

Fig. 32 Summary: The added societal value of Balu und Du

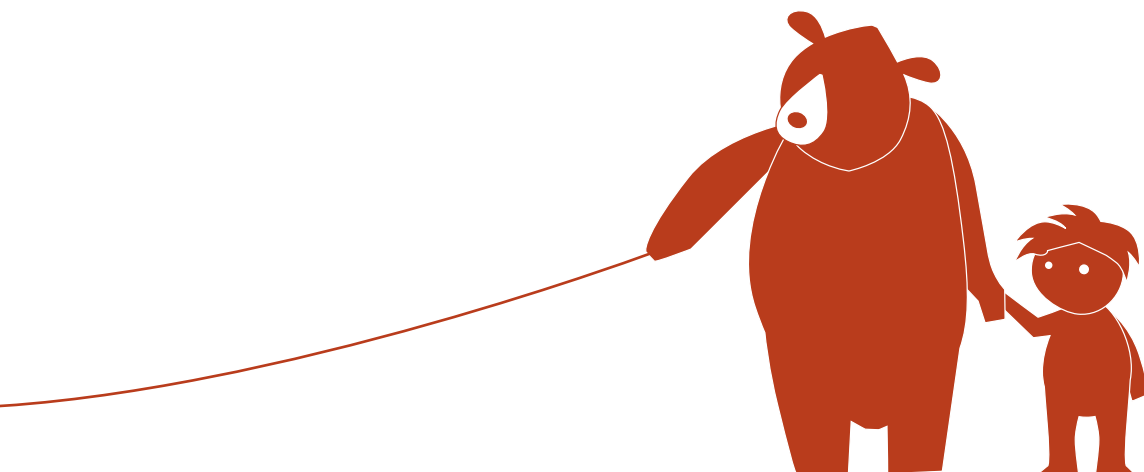


Chapter



Investments in the *Balu und Du* Mentoring Program

All investments in the program are considered in this section. This includes direct, as well as indirect and non-cash investments.



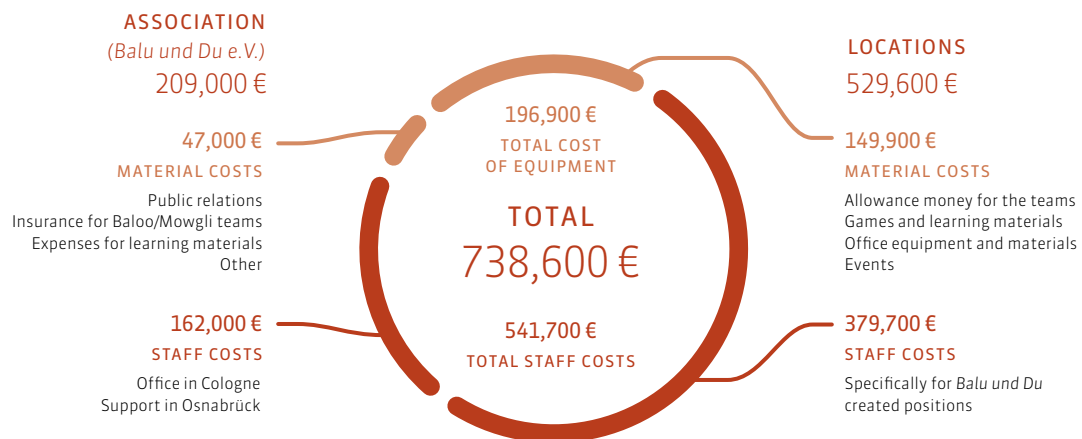
4.1 Direct investments⁸³

Balu und Du is an efficient program; it operates in more than 60 locations on a small annual budget and has around 750 Baloo/Mowgli pairs.

In 2012, 738,600 euros were invested in the program. This breaks down to about 1,000 euros per pair, which includes all costs incurred to support Baloos during weekly seminars, coordination costs at each location, costs from the head office in Cologne, as well as event expenses (such as the farewell ceremonies at the end of the program).

In total, the non-profit association costs from 2012 amounted to 209,000 euros. That same year, the costs of network partners in each location amounted to 529,600 euros. Most of the costs are attributable to staff and are treated as direct investments into the *Balu und Du* program. Around 8,825 euros were required for direct investments per location in order to be able to carry out the program for a year.

Fig. 33 Direct investments in 2012



4.2 Indirect and non-cash investments⁸³

The program only requires a small number of direct financial investments. This comes down to *Balu und Du* being able to fall back on numerous resources including:

Investments that arise even without *Balu und Du* (indirect investments)

For the educational institutions and non-profit organizations that support *Balu und Du*, staff members (particularly each location coordinator) who dedicate their time to the program must be paid. *Balu und Du* is, however, part of the regular curriculum at many secondary schools, vocational schools and universities, where staff undertake the program implementation and organization during regular work time. As a result, these staff costs count as expenses that would have

been incurred by the institution even without participating in the mentoring program and are therefore treated as indirect investments. For example, teachers allocate approximately two hours of their time per week to the program and staff members at partner organizations spend a number of weekly hours on the program. Without *Balu und Du*, these hours would simply be reassigned to other tasks. Other indirect investments include the cost of the seminar and event rooms and offices that are used for *Balu und Du*—all of which already exist.

In 2012, these indirect investments amounted to 569,000 euros.

⁸³ The cost analysis refers to direct and indirect costs of *Balu und Du* e.V. and the network partners in the business year 2012. They were set using a 1.5% rate of inflation and projected in the 2014 euro value.

Voluntary/unpaid services (non-cash investments)

The mentoring program’s efficiency is largely attributable to the many voluntary hours that the Baloos dedicate to the Mowglis. If a monetary value were to be assigned to this time (e.g. 8 euros per hour – a common hourly pay rate for childcare), the resulting sum would be around 528,100 euros.⁸⁴ In addition, elementary school teachers put in unpaid overtime outside of their regular teaching schedules to recruit Mowglis and convince parents that their children should participate. This happens via telephone conversations and face-to-face discussions, which primarily take place in the evening. Likewise, the coordinators at *Balu und Du* e.V. and the individual locations often spend unpaid time

helping develop the program or organize events. All of this voluntarily invested time adds up to 58,400 euros (based on an hourly rate of 8 euros). Equipment and materials, such as games or learning material, are also donated to support the association. In 2012, these donations totaled a value of 9,000 euros. All voluntary hours and days, together with the material donations, make up the non-cash investments.

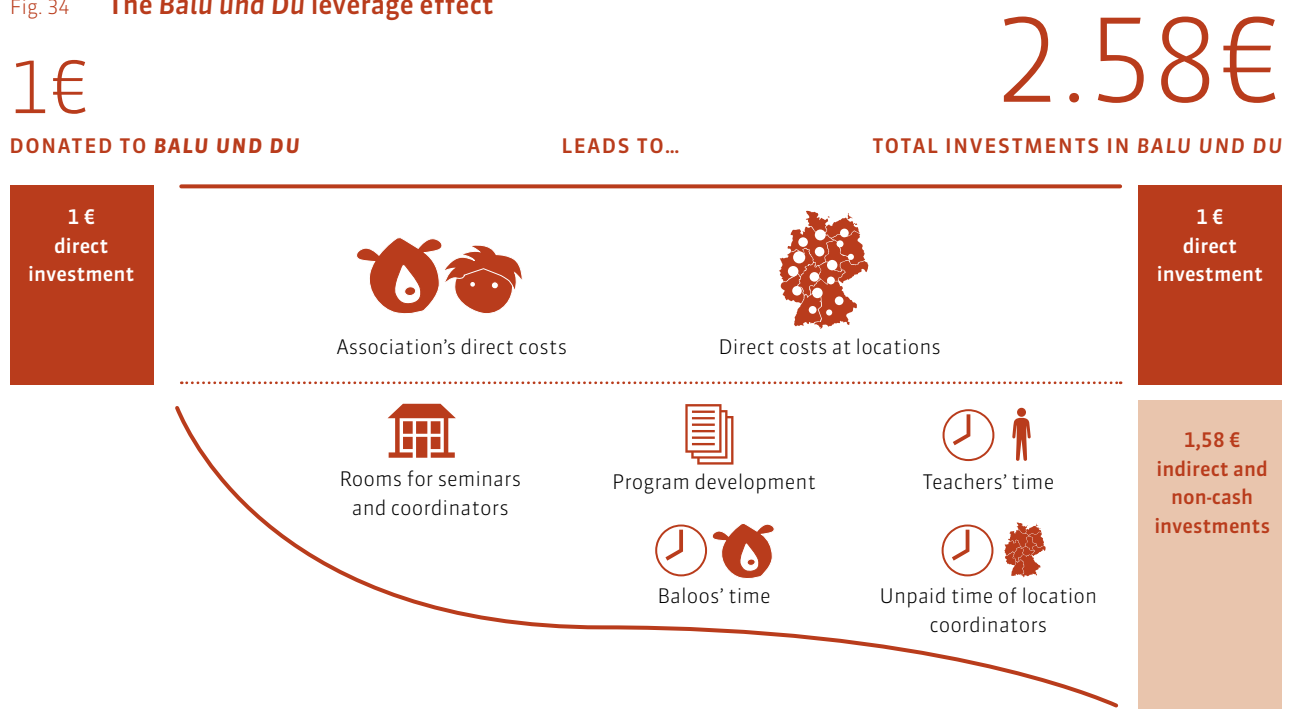
The value of non-cash investments generated by *Balu und Du* amounted to an estimated 595,500 euros in 2012.

4.3 The *Balu und Du* leverage effect

In 2012, direct investments totaling 738,600 euros resulted in an additional 569,000 euros in indirect investments made by educational institutions and non-profit organizations. Additionally, there were 595,500 euros in voluntary/unpaid services (non-cash investments).

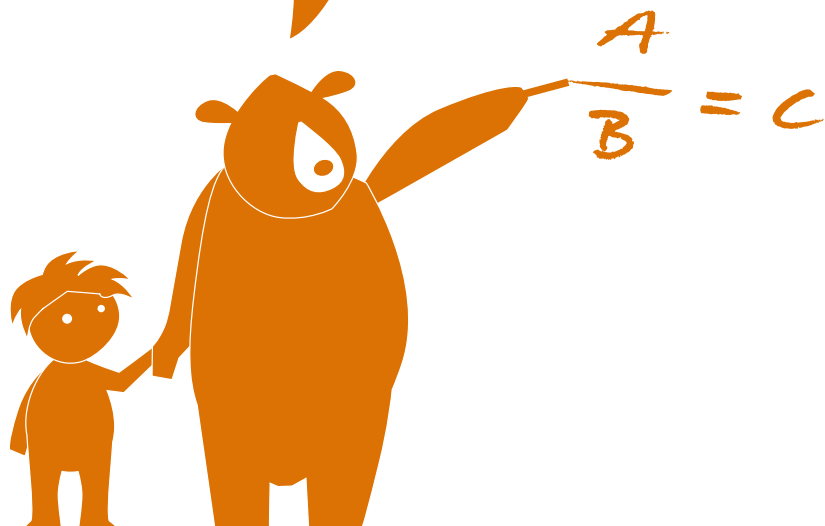
This means that one euro directly invested in *Balu und Du* actually translates into an additional 1.58 euros flowing into the program (0.77 euros are indirect and 0.81 euros are non-cash investments). Therefore, each euro donated yields 2.58 euros — a significant leverage effect!

Fig. 34 The *Balu und Du* leverage effect



⁸⁴ In the case of Baloos who took part in the program to obtain a certificate as part of their studies, only the time spent with the Mowglis was factored in, as the hours spent in seminars and updating their journals could have been put towards studying or other learning opportunities.

Chapter

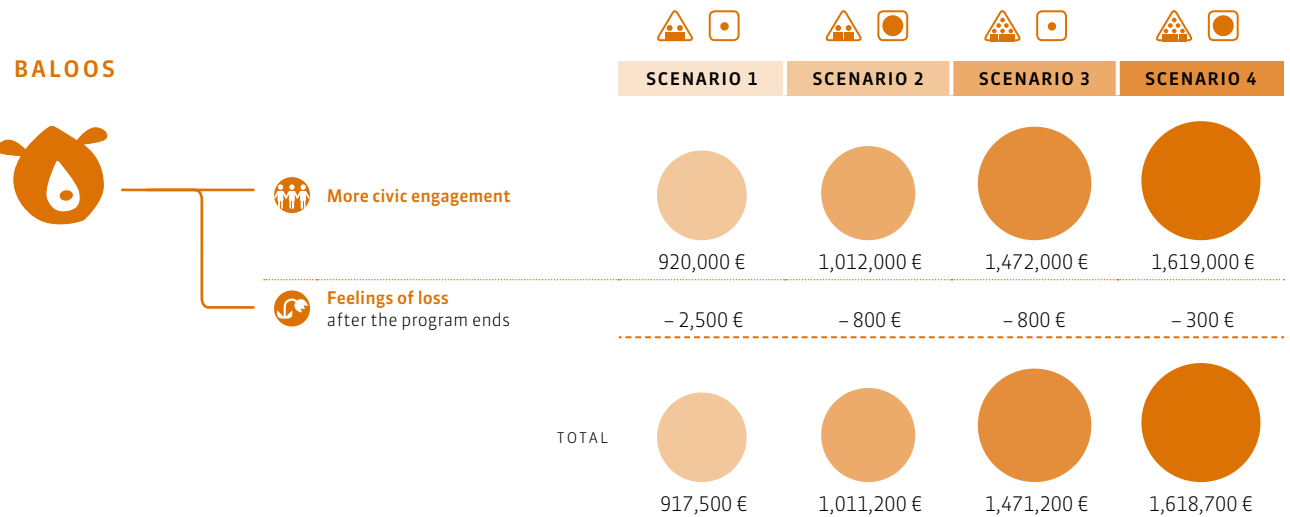
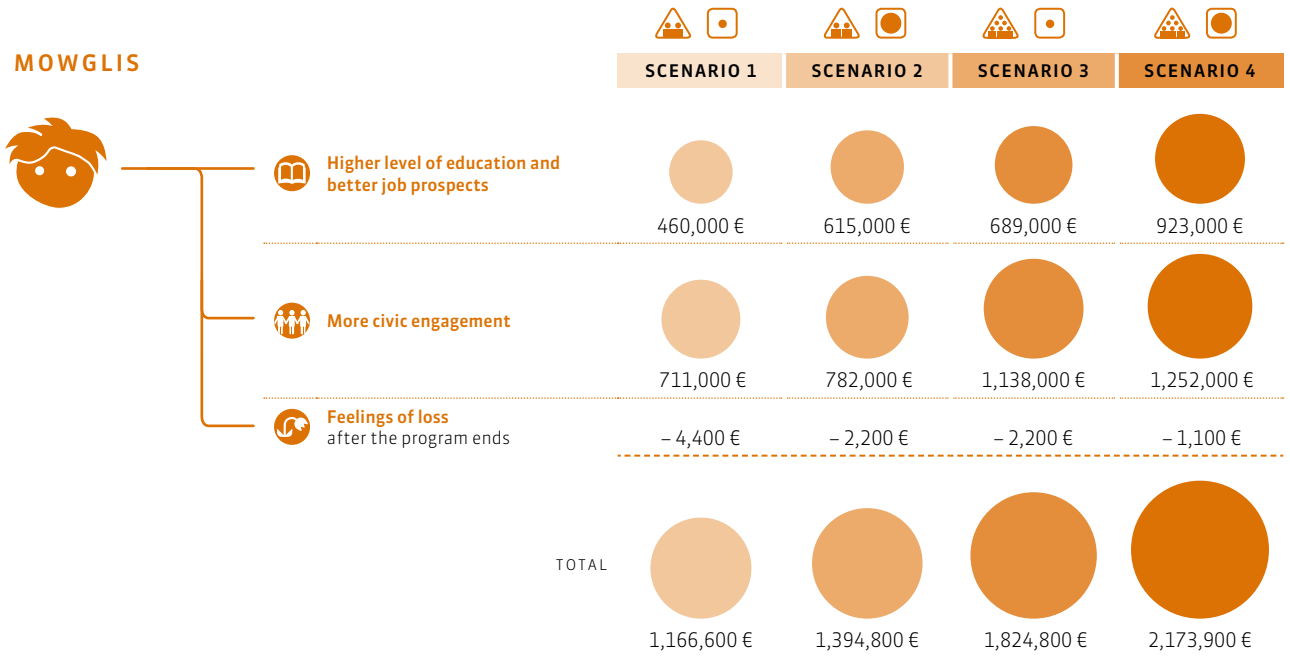


Balu und Du's **Social Return on Investment**

To effectively assess the program, the added societal value is considered in relation to the investments. The social return on investment is the result of this comparison. The calculated SROI coefficient conveys the overall social returns that arise from one euro invested in the program.

Tab. 3 **The calculated added societal value per stakeholder**

The projected value added for each individual stakeholder can be summarized as follows:



PUBLIC SECTOR



Savings resulting from **fewer former Mowglis in the school-to-work transition system**



SCENARIO 1

11,000 €



SCENARIO 2

15,000 €



SCENARIO 3

17,000 €



SCENARIO 4

23,000 €



Savings resulting from **lower rates of unemployment among former Mowglis**



319,000 €



417,000 €



478,000 €



625,000 €



More tax revenues resulting from the **former Mowglis' higher incomes**



631,000 €



845,000 €



947,000 €



1,267,000 €



Savings resulting from **better mental and physical health of former Mowglis**



100,000 €



150,000 €

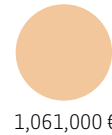


183,000 €

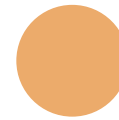


268,000 €

TOTAL



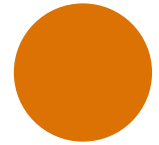
1,061,000 €



1,427,000 €



1,625,000 €



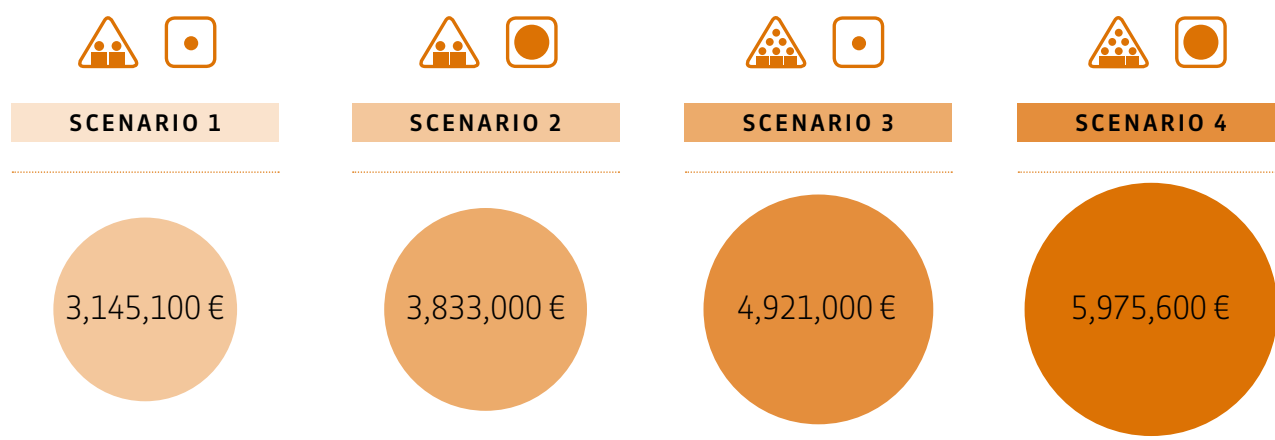
2,183,000 €

Tab. 4 The added societal value per impact driver

		SCENARIO 1	SCENARIO 2	SCENARIO 3	SCENARIO 4
EDUCATION	The positive impact of the program on Mowglis regarding school, vocational training and occupation	1,421,000 €	1,892,000 €	2,131,000 €	2,838,000 €
VOLUNTARY WORK	The positive impact of the program on Mowgli and Baloos' civic engagement	1,631,000 €	1,794,00	2,610,000 €	2,871,000 €
HEALTH	The positive impact of the program on Mowglis' mental and physical health	100,000 €	150,000 €	183,000 €	268,000 €
FEELINGS OF LOSS	Negative impact on Mowglis and Baloos due to one member of the pair quitting during the program, or due to the program ending	-6,900 €	-3,000 €	-3,000 €	-1,400 €

Tab. 5 **Total value added from the *Balu und Du* program**

The calculated added societal value based on the four scenarios is **between 3.1 and 6 million euros**.

Tab. 6 **Calculating the SROI coefficient**

The completion of the SROI analysis serves as the basis for calculating the SROI coefficient, which results from the added societal value being compared to the direct investments:

	SCENARIO 1	SCENARIO 2	SCENARIO 3	SCENARIO 4
ADDED SOCIETAL VALUE	3,145,100 €	3,833,000 €	4,921,000 €	5,975,600 €
DIRECT INVESTMENTS	740,000 €	740,000 €	740,000 €	740,000 €
=	4.25	5.18	6.66	8.08

Each euro that was invested in *Balu und Du* during 2012 is estimated to yield **a social return on investment between 4.25 and 8.08 euros** for the stakeholders (Mowglis, Baloos, public sector, society) until the year 2071.⁸⁵

The coefficient varies depending on whether the effect (intensity) of the impact is more or less intense. The proportion of participants (reach) who are affected by whether the program is bigger or smaller also varies.

⁸⁵ Estimated euro value from 2014.

Fig. 35 **Distribution of the added societal value per impact driver**⁸⁶

Alternative scenario

Factoring in the indirect investments

In SROI analyses, it is common to calculate a social return on investment from an overall societal perspective, which means taking into account all actual costs incurred. For the *Balu und Du* calculation, this means estimating which social return on investment would occur if *Balu und Du* were to cover all costs (i.e. if there was no significant leverage effect through the connection to schools and universities).

In order to calculate this, all indirect investments that would have occurred even without the program would need to be added, which includes staff costs of teachers who dedicate part of their working week to the program, as well as the value of equipment (particularly meeting rooms and facilities) that are used by *Balu und Du*. The costs amount

to an additional 569,000 euros, meaning that the total investment of 1,307,600 euros would be required. Factoring in these indirect investments, the social return on investment lies between 2.39 and 4.54 euros for every euro invested. These values speak to the high impact of the program.

Still, it is clear that the leverage effect resulting from the clever use of outside resources and incorporation of the program at schools and universities leads to a distinctly higher social return on investment. Not only does this once again underscore the effectiveness of *Balu und Du*, it also highlights the potential of using outside resources deftly in order to increase efficiency.

Conclusion:

Every euro invested in the Balu und Du program today returns at least 4.25 euros⁸⁷ —in other words, a social return on investment of at least 425%.

⁸⁶ Average of the four scenarios.

⁸⁷ 2014 euro value.

Outlook

What are the long-term overall benefits to society that result from one euro being invested in *Balu und Du*? This was the question put forward at beginning of the study and, following the SROI analysis, it can now be answered. Every euro invested in the mentoring program has the potential to generate an added value between 4.25 and 8.08 euros⁸⁸ for relevant stakeholders (the children being cared for, mentors, the public sector, and society).

This answer begs the question: so what? What conclusions can be drawn from this regarding the funding of social measures and non-profit programs in the future?

1 *Balu und Du* should be supported.

Increasing support for *Balu und Du* would allow this very successful mentoring program to expand. Each additional *Balu und Du* operation would result in long-term added value for elementary school children, young adults, communities, and the respective German states. At the same time, additional funds would help secure additional indirect and non-cash services and efforts for the program, since every donation made to *Balu und Du* has a strong leverage effect (each euro donated generates a further 1.58 euros in additional indirect investments and non-cash services).

2 Prevention programs pay off.

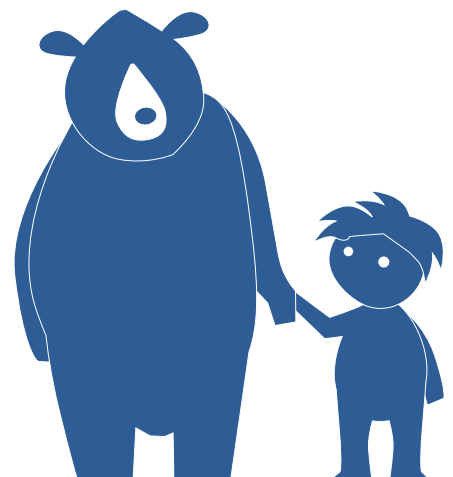
Supporting prevention programs is highly valuable, because they deliver an especially secure and high social return on investment. Programs that start during childhood can shape a child's entire life and have an enormous influence on social coexistence. The program *Balu und Du* generates a high added societal value, because it can have a positive impact over the entire course of a participant's life. One euro invested early on results, long-term, in rich, deep returns. With this comes the consideration of whether, in principle, more public and private funds should flow into preventive measures.

3 The impact of social programs can be monetized.

In Germany, there are countless publications and studies on social sector costs and public expenditure, as well as a rich array of statistical data that can be used to estimate the monetary value of social impacts. An SROI analysis enables this process. This study aims to show how social returns on investment can be estimated in the future. However, monetary estimates of future social programs are always based on assumptions using past evidence. The more often a program is evaluated (this is the case for *Balu und Du*), the stronger this evidence is.

4 Monetization creates a better platform for decision-making.

Transparency on the impact of a program in relation to investments made can promote trust. Monetization helps make the direct comparison between the value of investments and the value of societal impact. This helps funding bodies and investors make the best decisions regarding the use of their funds and can help them better understand the impact of non-profit programs. Monetization is able to demonstrate that even limited financial subsidies can often yield remarkable results.





Appendix

About the authors



Clara Péron is the founder and managing director of Value for Good GmbH. Her Berlin-based consulting firm specializes in quantitative impact assessments and developing business models that contribute to society. Value for Good provides strategic consulting advice to private, public and non-profit sector clients on innovation, sustainability, cross-sector partnerships and social impact. Clara started her career in 2002 in the Canadian Foreign Service, where she spent two years working at the Canadian High Commission in New Delhi, as well as in East Africa (Kenya, Ethiopia, Djibouti) as an immigration and refugee officer. Following this, Clara took on various roles in different fields. In 2007, she worked in Cambodia as a personal advisor to an American impact investor. Between 2008 and 2012, she worked as a strategy consultant at the Boston Consulting Group's (BCG) Berlin office, where she advised senior executives in various industries throughout Europe, Egypt, and South Africa. During her time at BCG, she also led several projects for UN organizations, with a particular focus on performance management, monitoring and evaluation. In 2012 and 2013, she worked as a philanthropy consultant for foundations in Berlin before launching Value for Good GmbH. Clara completed a Bachelor of Arts (Honors) in International Relations at McGill University in Montreal and earned a Master in Public Policy (MPP) at the Harvard Kennedy School of Government.



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Evidence of the effects and impacts for Mowglis and Baloos



Tab.7 Short-term effects for Mowglis

Short-term effects	Research object	Effect/size: short-term effects	Source: short-term effects
Individual attention	<i>Balu und Du</i>	Mowglis met with Baloos on average 2 hours × 30 meet-ups in the year 2012 = 60 hours of 1:1 attention per Mowgli (p. 12)	Balu und Du (2012): Jahresbericht 2012. 27 pages.
	<i>Balu und Du</i>	Most pairs stayed together for the whole year. There was an 11.1% withdrawal rate for the <i>Balu und Du</i> mentoring program. (p. 192)	H. Müller-Kohlenberg (2012): My home is my castle – Welche Zugangswege gibt es zu benachteiligten Familien? In: Forschung und Praxis der Gesundheitsförderung. Vol. 41: Gesund aufwachsen in Kita, Schule, Familie und Quartier. Nutzen und Praxis verhaltens- und verhältnisbezogener Prävention. KNP Conference on May 18–19, 2011 in Bonn. Cologne: Federal Centre for Health Education (BzGA), p. 191–201.
Positive experiences and more enjoyment of life	<i>Balu und Du</i>	“Die drei Schülerinnen meiner Klasse ..., die bis jetzt einen ‘Balu’ hatten, sind sehr glücklich ...” (“The three female students in my class ... who have had a Baloo until now are very happy ...”) (p. 196)	Interviews with teachers, emails from teachers, cited in: H. Müller-Kohlenberg (2012): My home is my castle – Welche Zugangswege gibt es zu benachteiligten Familien? In: Forschung und Praxis der Gesundheitsförderung. Vol. 41: Gesund aufwachsen in Kita, Schule, Familie und Quartier. Nutzen und Praxis verhaltens- und verhältnisbezogener Prävention. KNP Conference on May 18–19, 2011 in Bonn. Cologne: Federal Centre for Health Education (BzGA), p. 191–201.
	<i>Balu und Du</i>	“Er/Sie hat eine fröhliche Grundstimmung” (“He/She has a happy temperament”), effect strength (Cohens $d =$) 0.55 (control group 0.04). Effect rating: medium. But also: “Zu Beginn des Projekts verzeichneten die LehrerInnen eine leicht negative Grundstimmung.” (“At the beginning of the project, the teachers registered a slightly negative temperament.”) (p. 13)	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (ed.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt.
	<i>Balu und Du</i>	Observations made by 27 parents about changes in their child: the fourth highest entry made by the parents was: “sie (die Mowglis) werden fröhlicher.” (“they (the Mowglis) became happier.”) (p. 15)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.
Insight into new ways of life	<i>Balu und Du</i>	“Durch Besuche der ‘Moglis’ in der WG des ‘Balus’ oder im Studentenwohnheim lernen die Kinder manchmal eine neue Lebenswelt kennen. Begegnungen mit anderen kulturellen Milieus lassen die Besonderheit – vielleicht auch Begrenztheit – des eigenen Settings erkennen.” (“By visiting the Baloos’ apartment or student residence, the Mowglis sometimes get to learn about new ways of life. Encounters with other cultural milieus indicate the specific (sometimes limited) nature of a person’s own setting.”) (p. 197)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.
New friendship(s)	<i>Balu und Du</i>	The relationship between a Mowgli and Baloo often still exists after the program has come to an end. This can be viewed as evidence of a real friendship. 40% of the cohorts 1–12 had contact for six months or longer after the program finished, while 54% of the cohorts 13–20 had contact for six months or longer after the program finished. (p. 6)	Assessment of journal entries according to H. Müller-Kohlenberg (2012): My home is my castle – Welche Zugangswege gibt es zu benachteiligten Familien? In: Forschung und Praxis der Gesundheitsförderung. Vol. 41: Gesund aufwachsen in Kita, Schule, Familie und Quartier. Nutzen und Praxis verhaltens- und verhältnisbezogener Prävention. KNP Conference on May 18–19, 2011 in Bonn. Cologne: Federal Centre for Health Education (BzGA), p. 191–201.
More physical exercise	<i>Balu und Du</i>	The Baloos’ journals show that the “Entwicklung motorischer Kompetenzen” (“development of motor skills”) in Mowglis is an important effect of the program (approx. 95 mentions). (p. 60)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.



Tab. 8 Medium-term effects for Mowglis

Medium-term effects	Research object	Effect/size: medium-term effects	Source: medium-term effects
A more realistic self-assessment	<i>Balu und Du</i>	Table 3. Realistic self-assessment "Child appraises his/her athletic ability realistically": low progress overall (net effect size: total group 0.27); within extreme group: high progress (net effect size: 0.92) (p. 115)	H. Müller-Kohlenberg, S. Drexler (2013): Balu und Du ("Baloo and You") – A Mentoring Program: Conception and Evaluation Results. In: M. S. Shaughnessy (ed.): Mentoring: Practices, Potential Challenges and Benefits. New York, p. 107–123.
	<i>Balu und Du</i>	"Vergleiche der Mittelwerte von 37 Schülerinnen und Schülern zwischen drei Erhebungszeitpunkten (zu Projektbeginn, zu Projektende und etwa zwei Jahre nach Abschluss des Projektes) lassen auf stabile Veränderungen schließen. Insbesondere der Effekt einer realistischeren Einschätzung der eigenen sportlichen Leistung bleibt über einen Zeitraum von 21–27 Monaten nach Projektende bestehen." ("Comparisons of the mean values of 37 students between three survey periods (at the beginning of the project, at the end of the project, and about two years after the completion of the project) suggest stable changes. In particular, the effect of a more realistic assessment of their own athletic performance persists over a timeframe of 21–27 months after the completion of the project.") (p. 11)	C. Weniger (2013): Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogrammes „Balu und Du“ im Spiegel von Lehrerurteilen. Diploma thesis, Institut für Psychologie, University of Osnabrück.
	<i>Balu und Du</i>	Assessment of 37 children by a teacher on a 5-step scale: Did the child generally assess his/her athletic performance in a realistic way? T1: 3.1389 to T3: 3.7027. (p. 20)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.
Positive attitude towards their own performance	<i>Balu und Du</i>	"Er/Sie kann Kritik annehmen" ("He/She can accept criticism"), effect strength (Cohens d =) 0.65 (control group 0.37). Effect rating: medium. N=102/51. (p. 253)	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (ed.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt 2008.
	<i>Balu und Du</i>	Observations made by 27 parents about changes in their child. The Mowglis exhibit the following changes (in order of frequency of response): they become more independent, self-assured and self-aware. (p. 15)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.
	<i>Balu und Du</i>	Assessment of 37 children by a teacher on a 5-step scale: Was the child unsure when taking on new tasks? T1: 3.6897 to T3: 3.2162. (p. 20)	
Positive behaviors (tolerance, respect)	<i>Balu und Du</i>	"Er/Sie zeigt Kommunikationsfreude verbaler Art" ("He/She shows likes to communicate verbally"), effect strength (Cohens d =) 0.92 (control group 0.24). Effect rating: high. N=102/51. (p. 253) "Er/Sie ist beim Spielen in der Pause gut integriert" ("He/She plays well with others during breaks"), effect strength (Cohens d =) 0.90 (control group 0.74). Effect rating: high. "Im Hinblick auf eine pos. weitere Entwicklung darf die Integration in der Kindergruppe als wichtiges Signal gelten" ("Integration in the children's group can be viewed as an important sign with regards to pos. further development"), N=102/51. (p. 253)	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (ed.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt.
	<i>Balu und Du</i>	Observations made by 27 parents about changes in their child. The Mowglis exhibit the following changes (in order of frequency of response): they become more open. (p. 15)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramm „Balu und Du“. Osnabrück.
	<i>Balu und Du</i>	Comparison of the effect strength between the intervention group (IG) (N=51) and the control group 2 (CG) (N=36): "Er/Sie ist hilfsbereit gegenüber anderen SchülerInnen" ("He/She is helpful to other students"): IG: 0.41/CG: 0.02 "Er/Sie zeigt Kommunikationsfreude verbaler Art" ("He/She likes to communicate verbally"): IG: 0.92/CG: -0.1. (p. 35)	M. Schlüter, H. Müller-Kohlenberg (2010): Feststellung der Wirksamkeit von Präventionsmaßnahmen am Beispiel des Mentorenprogramms „Balu und Du“: Effektstärken, Netto-Effektstärken und die Funktion von Kontrollgruppen. In: Stiftung Deutsches Forum für Kriminalprävention (ed.): forum kriminalprävention. 3/2010, p. 34–36.
	<i>Balu und Du</i>	During the project timeframe, socially accepted behavior increases (better social adjustment at home, at school, and during recreational time—recreational time is significant); aggressive behavior decreases (social problems decrease at home, at school, and during recreational time—recreational time is significantly high) – Graphic 1, EAS Test results, N=34. (p. 34)	D. Esch, M. Szczesny, H. Müller-Kohlenberg (2005): „Balu und Du“. Ein Präventionsprogramm zur Vermeidung von Devianz, Aggression und Gewalt im Jugendalter. In: Festschrift anlässlich der Verleihung des Deutschen Förderpreises Kriminalprävention 2005. Schriftenreihe der Polizei-Führungsakademie, 4/2005, p. 21–51.



Medium-term effects	Research object	Effect/size: medium-term effects	Source: medium-term effects
Insights into unfamiliar worlds and people	Balu und Du	Results of the OSKAR scaling for teachers, N=51: "Er/Sie hat vielfältige Alltagskompetenzen" ("He/She has diverse competencies for everyday life"): Effect: 0.44 (Cohens d). Graphic 9: Code frequencies in Baloo's journals with regard to informal learning: "Verständnis für Naturphänomene" ("Understanding of natural phenomena") = approx. 75 mentions. (p. 58, 60)	D. Esch, M. Szczesny, H. Müller-Kohlenberg (2006): „Balu und Du“. Ein Präventionsprogramm In: Gesicht zeigen! Aktion weltoffenes Deutschland e. V. (ed.): Netzwerken – Gewusst wie. Dokumentation der Fachtagung. Berlin, p. 51–64.
	Balu und Du	"Er/Sie beteiligt sich rege im Unterricht" ("He/She is actively involved in lessons"), effect strength (Cohens d =) 0.50 (control group 0.09). Effect rating: medium. "Der Wert nach einem Jahr Projektzeit entspricht dem Durchschnitt aller Schüler der Klasse" ("The value after one year of project time corresponds to the average of all students in the class"), N=102/51. (p. 253)	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (Hrsg.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt.
Interest, motivation, and willingness to learn	Balu und Du	Table 2. Motivation and participation (p. 114) "Child was motivated to learn": low progress overall (net effect size: total group 0.43); within extreme group: high progress (net effect size: 0.86) "Child took part in class": low progress overall (net effect size: total group 0.26); within extreme group: moderate progress (net effect size: 0.70) Table 4. Ability to concentrate (p. 116) "Willingness of the child to make an effort": low progress overall (net effect size: total group 0.14); within extreme group: high progress (net effect size: 0.87)	H. Müller-Kohlenberg, S. Drexler (2013): Balu und Du ("Baloo and You") – A Mentoring Program: Conception and Evaluation Results. In: M. S. Shaughnessy (ed.): Mentoring: Practices, Potential Challenges and Benefits. New York, p. 107–123.
	Balu und Du	Comparisons of the mean values of 37 students between three survey periods (at the beginning of the project, at the end of the project, and about two years after the completion of the project) suggest stable changes. There are also indications that the increased motivation to learn resulting from the project, as well as the growing participation in lessons, will persist in the long term. (p. 11)	C. Weniger (2013): Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogramms „Balu und Du“ im Spiegel von Lehrerurteilen. Diploma thesis, Institut für Psychologie, University of Osnabrück
	Balu und Du	Comparison of the effect strength between the intervention group (IG) (N=51) and the control group 2 (CG) (N=36): "Er/Sie ist bereit, kleine Extra-Aufgaben zu übernehmen" ("He/She is willing to take on small extra tasks"): IG: 0.48/CG: 0.08. (p. 35)	M. Schlüter, H. Müller-Kohlenberg (2010): Feststellung der Wirksamkeit von Präventionsmaßnahmen am Beispiel des Mentorenprogramms „Balu und Du“: Effektstärken, Netto-Effektstärken und die Funktion von Kontrollgruppen. In: Stiftung Deutsches Forum für Kriminalprävention (ed.): forum kriminalprävention. 3/2010, p. 34–36.
	Balu und Du	"Er/Sie ist beim Spielen in der Pause gut integriert" ("He/She plays well with others during breaks"), effect strength (Cohens d =) 0.90 (control group 0.74). Effect rating: high. "Im Hinblick auf eine positive weitere Entwicklung darf die Integration in der Kindergruppe als wichtiges Signal gelten" ("Integration in the children's group is an important sign in regards to positive further development"), N=102/51. (p. 253)	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (Hrsg.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt.
Experience with relationship building	Balu und Du	Comparisons of the mean values of 37 students between three survey periods (at the beginning of the project, at the end of the project, and about two years after the completion of the project) suggest stable changes. In particular, the effect of increased joy in contact with other children persists over a period of 21–27 months after the project's conclusion. (p. 11)	C. Weniger (2013): Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogramms „Balu und Du“ im Spiegel von Lehrerurteilen. Diploma thesis, Institut für Psychologie, University of Osnabrück



Medium-term effects	Research object	Effect/size: medium-term effects	Source: medium-term effects
Physical and mental well-being	Balu und Du	Table 5. Health-related quality of life (KIDSCREEN) (p. 116) “Physical well-being”: low progress overall (net effect size: total group 0.16); within extreme group: very high progress (net effect size: 1.19) “Psychological well-being”: low progress overall (net effect size: total group 0.09); within extreme group: moderate progress (net effect size: 0.54)	H. Müller-Kohlenberg, S. Drexler (2013): Balu und Du (“Baloo and You”) – A Mentoring Program: Conception and Evaluation Results. In: M. S. Shaughnessy (ed.): Mentoring: Practices, Potential Challenges and Benefits. New York, p. 107–123.
	Balu und Du	Comparisons of the mean values of 37 students between three survey periods (at the beginning of the project, at the end of the project, and about two years after the completion of the project) suggest stable changes. In particular, the effect of a better diet persists over a period of 21–27 months after the project’s conclusion and for general health the effect remains stable. (p. II)	C. Weniger (2013): Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogrammes „Balu und Du“ im Spiegel von Lehrerurteilen. Diploma thesis, Institut für Psychologie, University of Osnabrück
	Balu und Du	Assessment of 37 children by a teacher on a 5-step scale: How would you describe the child’s health, generally? T1: 2.8378 to T3: 3.1667. (p. 18)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.
Feelings of loss after the program ends	Balu und Du	Parents who participated in a survey outlined a few “lows” of the program: “Tiefen? Höchstens, wenn Balu nicht konnte, wenn er gesagt, nee, er ist jetzt krank ...” (“Lows? Mainly, when Baloo was not able to meet, if he said no, he is sick right now ...”) (P 14/117); “Viel kurzfristige Absagen der Studentinnen!!” (“A lot of cancellations by the students at short notice!!”); “Die Kinder fühlen sich dann verarscht, auf gut Deutsch gesagt.” (“The children feel like they’re being screwed over.”) (P 16/187); “Mehr Zeit als eine Stunde” (“More than one hour”) (P 17/16) – irritated: “Ne, ne ... Das einzige, was ärgerlich is ... nachdem das Projekt zu Ende war, war der Kontakt vorbei” (“No, no ... the only irritating thing is ... after the project ended, there was no more contact.”) (P 17/114) (p. 12)	C. Weniger (2013): Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogrammes „Balu und Du“ im Spiegel von Lehrerurteilen. Diploma thesis, Institut für Psychologie, University of Osnabrück
	External	Should the relationship with the mentor deteriorate, these youth would be at risk of becoming significantly more isolated from adult support. (p. 30)	J. P. Tierney, J. B. Grossman, N. L. Resch (2000): Making a Difference: An Impact Study of Big Brothers Big Sisters. Philadelphia, 71 pages.

Tab. 9 Long-term effects for Mowglis



Long-term effects	Research object	Effect/size: long-term effects	Source: long-term effects
General information about the persistence of medium-term outcomes	Balu und Du	Comparisons of the mean values of 37 students between three survey periods (at the beginning of the project, at the end of the project, and about two years after the completion of the project) suggest stable changes. (p. II)	C. Weniger (2013): Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogrammes „Balu und Du“ im Spiegel von Lehrerurteilen. Diploma thesis, Institut für Psychologie, University of Osnabrück
Less stress	Balu und Du	Poor mentoring by Baloo correlated with higher cortisol levels in Mowglis. “Obwohl es keine signifikanten Mittelwertsunterschiede des Haarcortisols zu den beiden Messzeitpunkten gab (N=20), wurden zwei Beziehungsaspekte identifiziert, die einen signifikanten Zusammenhang mit der Cortisolveränderung haben: nondirektives Lenkungsverhalten (0,55) und unsichere Reaktion in schwierigen Situationen (0,45).” (“Although there were no significant mean differences in hair cortisol (N = 20), two aspects of relationship, which show a significant correlation with the changes in cortisol levels, were identified: a nondirective style of control (r = 0.55) and an insecure reaction in difficult situations (r = 0.45).”) (p. 1)	H. Angermann, L. Ohlemann (2012): Die Mentoringbeziehung im Präventionsprojekt „Balu und Du“: Eine Analyse des Zusammenhangs von inhaltsanalytisch erhobenen Beziehungsaspekten mit der Veränderung des Cortisolspiegels der Mentees. Research colloquium about „Balu und Du“, Osnabrück, not published.
	Balu und Du	Observations made by 27 parents about changes in their child. The Mowglis exhibit the following changes: They become more relaxed and calmer. (p. 15)	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.



Long-term effects	Research object	Effect/size: long-term effects	Source: long-term effects
More empathy and understanding of others	<i>Balu und Du</i>	Representation of the program's net effect strength on empathy levels: The net effect strength of an increase in empathy was the strongest among the boys in the extreme group of Mowglis: approx. 0.8 (IVE Test). (p. 17)	N. Schomborg, H. Müller-Kohlenberg (2012): „Balu und Du“ – ein außerschulisches Mentorenprogramm für benachteiligte Grundschul Kinder. In: Handbuch für Erzieherinnen. 67th edition, 40/part 5, p. 1–21.
Internalization of recognized values and norms	<i>Balu und Du</i>	“Positive results are reported in the following areas: ... personal hygiene (e.g. washing hands after toilet); low progress overall (net effect size: total group 0.25); within extreme group: very high progress (net effect size 1.24) (N.B. Each single ‘extreme group’ of unfavorable beginners includes only those who are disadvantaged in this particular field. The term ‘extreme group’ refers to the percentage of cases that demonstrates particularly low or undesirable results at the time of the first survey).” Children’s self-assessment of their personal hygiene (progress after one year of mentoring)” (p. 117)	H. Müller-Kohlenberg, S. Drexler (2013): Balu und Du (“Baloo and You”) – A Mentoring Program: Conception and Evaluation Results. In: M. S. Shaughnessy (ed.): Mentoring: Practices, Potential Challenges and Benefits. New York, p. 107–123.
	<i>Balu und Du</i>	Graphic 9: Code frequencies in the Baloo’s journals: “Vermittlung von Maßstäben und Normen” (“Procurement of standards and norms”) = approx. 150 mentions. (p. 60)	D. Esch, M. Szczesny, H. Müller-Kohlenberg (2006): „Balu und Du“. Ein Präventionsprogramm In: Gesicht zeigen! Aktion weltoffenes Deutschland e.V. (ed.): Netzwerke – Gewusst wie. Dokumentation der Fachtagung. Berlin, p. 51–64.
Greater ability to concentrate, more success in school	<i>Balu und Du</i>	“Er/Sie hat eine gute mündliche Ausdrucksfähigkeit” (“He/She has good verbal expression abilities”), effect strength (Cohens d =) 0.38 (control group 0.17). Effect rating: medium. “Aufgrund der intensiven mündl. Kommunikation im Projekt lagen die Erwartungen höher” (“Due to the intensive oral communication in the project, expectations were higher”), N=102/51. (p. 253) “Er/Sie kann sich gut konzentrieren” (“He/She can concentrate well”), effect strength (Cohens d =) 0.37 (control group 0.36). Effect rating: medium. “Aus Sicht der Eltern ist der Zuwachs an Konzentrationsfähigkeit die deutliche Leistung des Projekts” (“From the parents’ perspective, the increase in concentration levels is the significant achievement of the project”), N=102/51. (p. 253)	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (ed.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt.
	<i>Balu und Du</i>	Table 1. Self-organization (S. 114) “Child wrote down homework, if homework was given”: moderate progress overall (net effect size: total group 0.54); within extreme group: very high progress (net effect size: 1.46) “Child brought his/her classroom materials (books ...) to school”: moderate progress overall (net effect size: total group 0.41); within extreme group: moderate progress (net effect size: 0.55) “Child could complete homework because he/she took material home”: moderate progress overall (net effect size: total group 0.65); within extreme group: very high progress (net effect size: 1.79) Table 2. Motivation and participation (p. 114) “Child’s general scholastic ability”: low progress overall (net effect size: total group 0.29); within extreme group: moderate progress (net effect size: 0.52) Table 4. Ability to concentrate (p. 116) “Kaseler Concentration Test (modified)”: low progress overall (net effect size: total group 0.21); within extreme group: very high progress (net effect size: 1.25)	H. Müller-Kohlenberg, S. Drexler (2013): Balu und Du (“Baloo and You”) – A Mentoring Program: Conception and Evaluation Results. In: M. S. Shaughnessy (ed.): Mentoring: Practices, Potential Challenges and Benefits. New York, p. 107–123.
	<i>Balu und Du</i>	Comparisons of the mean values of 37 students between three survey periods (at the beginning of the project, at the end of the project, and about two years after the completion of the project) suggest stable changes. Stable effects can be observed regarding increased concentration in the classroom. (p. 11)	C. Weniger (2013): Kompetenzen und Wohlbefinden langfristig stärken: Zur Nachhaltigkeit des Mentorenprogrammes „Balu und Du“ im Spiegel von Lehrurteilen. Diploma thesis, Institut für Psychologie, University of Osnabrück



Long-term effects	Research object	Effect/size: long-term effects	Source: long-term effects
Stronger social network	Balu und Du	<p>“Er/Sie hat zahlreiche Kontakte außerhalb der Familie” (“He/She has numerous contacts outside of the family”), effect strength (Cohens d =) 0.98 (control group 0.26). Effect rating: high.</p> <p>“Insbesondere im Vergleich zur Kontrollgruppe ist der Zuwachs deutlich” (“The growth is considerable, particularly in comparison to the control group”), N=102/51. (p. 253)</p>	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (ed.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt.
	Balu und Du	<p>Comparison of the effect strength between the intervention group (IG) (N=51) and the control group 2 (CG) (N=36):</p> <p>“Er/Sie ist beim Spielen in der Pause gut integriert” (“He/She plays well with others during breaks”): IG: 0.90/CG: 0.10</p> <p>“Er/Sie hat zahlreiche Kontakte außerhalb der Familie” (“He/She has numerous contacts outside of the family”): IG: 0.98/CG: -0.08. (p. 35)</p>	M. Schlüter, H. Müller-Kohlenberg (2010): Feststellung der Wirksamkeit von Präventionsmaßnahmen am Beispiel des Mentorenprogramms „Balu und Du“: Effektstärken, Netto-Effektstärken und die Funktion von Kontrollgruppen. In: Stiftung Deutsches Forum für Kriminalprävention (ed.): forum kriminalprävention. 3/2010, p. 34–36.
Less aggression, juvenile delinquency, and criminal behavior	Balu und Du	<p>“Er/Sie kann Konflikte zwischen SchülerInnen kompetent bewältigen” (“He/She can handle conflicts between students competently”), effect strength (Cohens d =) 0.95 (control group 0.75). Effect rating: high.</p> <p>“Präventionstheoretisch ist die Konfliktbewältigungskompetenz eine bedeutsame Kategorie” (“In terms of prevention theory, competency in conflict management is an important category”), N=102/51. (p. 253)</p>	H. Müller-Kohlenberg (2008): Entwicklungsorientierte Prävention von Devianz im Jugendalter: Das Mentorenprojekt „Balu und Du“. In: Bundesministerium des Innern (ed.): Theorie und Praxis gesellschaftlichen Zusammenhalts. Texte zur inneren Sicherheit, gesellschaftlicher Zusammenhalt.
	Balu und Du	<p>Observations made by 27 parents about changes in their child. In order of frequency of response, the Mowglis exhibit the following changes: They become more relaxed and calmer. (p. 15)</p>	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.
	Balu und Du	<p>Comparison of the effect strength between the intervention group (IG) (N=51) and the control group 2 (CG) (N=36):</p> <p>“Seine/Ihre Aggressionsbereitschaft ist gering” (“His/Her verbally aggressive tendencies are low”): IG: 0.21/CG: -0.19</p> <p>“Seine/Ihre Neigung zu Gewaltanwendung ist gering” (“His/Her tendency to resort to violence is low”): IG: 0.22/CG: -0.17</p> <p>“Er/Sie kann Konflikte zwischen SchülerInnen gut und kompetent bewältigen” (“He/She can handle conflicts between students well and competently”): IG: 0.95/CG: -0.05. (p. 35)</p>	M. Schlüter, H. Müller-Kohlenberg (2010): Feststellung der Wirksamkeit von Präventionsmaßnahmen am Beispiel des Mentorenprogramms „Balu und Du“: Effektstärken, Netto-Effektstärken und die Funktion von Kontrollgruppen. In: Stiftung Deutsches Forum für Kriminalprävention (ed.): forum kriminalprävention. 3/2010, p. 34–36.
	External	<p>An absence of some or many character skills leads to higher levels of juvenile delinquency. This connection has been scientifically proven.</p>	J. J. Heckman, T. Kautz (2013): Fostering and Measuring Skills: Interventions That Improve Character and Cognition. Working Paper 19656. National Bureau of Economic Research, Cambridge, MA, November 2013, p. 28.

Tab.10 Impact for Mowglis



Impact	Research object	Effect/size of impact	Source: impact
General positive development of a child as a result of mentoring	External	<p>With regards to personality development, an adult outside of the family is the best influence for a child from a difficult family situation.</p>	E. E. Werner (2007): Entwicklung zwischen Risiko und Resilienz. In: Opp, G., Frigerle, M., Bender, D. (ed.): Was Kinder stärkt – Erziehung zwischen Risiko und Resilienz. Munich, Basel, p. 21–31.
Higher level of education and better job prospects	External	<p>A mature personality goes through a higher number of years of education. This correlation is underpinned by scientific evidence.</p>	J. J. Heckman, T. Kautz (2013): Fostering and Measuring Skills: Interventions That Improve Character and Cognition. Working Paper 19656. National Bureau of Economic Research, Cambridge, MA, November 2013, p. 23–24.
	External	<p>Fundamental skills like perseverance or sense of duty enable children to benefit more from school and the subjects learned there. Children that have the required endurance for more comprehensive tasks are overall more successful, even if the subject is boring. (p. 76)</p>	P. Tough (2012): How Children Succeed: Grit, Curiosity, and the Hidden Power of Character. Boston, New York.
	External	<p>Character skills that are supported through mentoring programs lead to a better performance in professional life. This correlation has been scientifically proven.</p>	J. J. Heckman, T. Kautz (2013): Fostering and Measuring Skills: Interventions That Improve Character and Cognition. Working Paper 19656. National Bureau of Economic Research, Cambridge, MA, November 2013, p. 24–26.



Impact	Research object	Effect/size of impact	Source: impact
More civic engagement	<i>Balu und Du</i>	66% of former Mowglis who were surveyed undertook voluntary work after the program ended. Of this figure, 56% stated that their time with the Baloo inspired them to volunteer.	Survey of former Mowglis that occurred online in July 2014 (N=20).
Better mental and physical health	External	A longitudinal study about risk and resilience in children from problematic backgrounds demonstrated that children prone to less problematic behavior can compensate for burdens in their lives through support from people ("at least one person in their lives who accepted them unconditionally") in their social surroundings.	E. E. Werner (1990): Protective factors and individual resilience. In: S. J. Meisels, J. P. Shonkoff (ed.): Handbook of early childhood intervention. Cambridge.
	External	An absence of some or many character skills leads to a higher risk of mortality. This correlation has been scientifically proven.	J. J. Heckman, T. Kautz (2013): Fostering and Measuring Skills: Interventions That Improve Character and Cognition. Working Paper 19656. National Bureau of Economic Research, Cambridge, MA, November 2013, p. 32.
	External	If someone has stable, positive caregivers in early childhood, the probability of developing psychogenic disorders in adulthood is lower.	W. Tress (1986): Das Rätsel der seelischen Gesundheit. Traumatische Kindheit und früher Schutz gegen psychogene Störungen. Göttingen.

Tab. 11 Short-term effects for Balooos



Short-term effects	Research object	Effect/size: short-term effects	Source: short-term effects
Moments of joy	<i>Balu und Du</i>	78% of Balooos experienced joy through the program, according to an evaluation of 102 personal reflection reports.	Evaluation of 102 personal reflection reports from Balooos. The evaluation occurred in August 2014 and was sourced from reports of the same year.
Interaction with children	<i>Balu und Du</i>	<p>"Das Projekt setzt sich aus drei Komponenten zusammen: die gemeinsam verbrachte Zeit mit dem Kind, dem 'Mogli' ..." ("The project is comprised of three components: the time spent together with the child, the 'Mowgli' ...")</p> <p>"Den Kindern soll dabei einmal in der Woche ein bis drei Stunden Zeit gewidmet werden für Gespräche, Hausaufgabenhilfe, Sport und Spiele, gemeinsame Unternehmungen oder sonstige Hilfen im Alltag" ("One to three hours a week should be dedicated to the child for discussion, homework help, sport and games, joint activities, and other help in everyday life.") (p. 160)</p>	H. Müller-Kohlenberg (2009): „Mogli“ blüht auf und „Balu“ erwirbt Schlüsselkompetenzen. Die Win Win-Situation im Projekt „Balu und Du“. In: K. Altenschmidt, J. Miller, W. Stark (ed.): Raus aus dem Elfenbeinturm? Entwicklungen in Service Learning und bürgerschaftlichem Engagement an deutschen Hochschulen. Weinheim/Basel, p. 160ff.
Certificate of voluntary work or study	<i>Balu und Du</i>	"Die Studierenden können Leistungsnachweise entsprechend der jeweiligen Studienordnung erwerben und erhalten zusätzlich ein Zertifikat für ehrenamtliche Tätigkeit." ("Students can obtain performance certificates according to the respective regulations and also receive a certificate for voluntary work.") (p. 160)	H. Müller-Kohlenberg (2009): „Mogli“ blüht auf und „Balu“ erwirbt Schlüsselkompetenzen. Die Win Win-Situation im Projekt „Balu und Du“. In: K. Altenschmidt, J. Miller, W. Stark (ed.): Raus aus dem Elfenbeinturm? Entwicklungen in Service Learning und bürgerschaftlichem Engagement an deutschen Hochschulen. Weinheim/Basel, p. 160ff.
New knowledge and skills	<i>Balu und Du</i>	<p>"In den Begleitseminaren für die 'Balus' passiert Wichtiges: (...) Erfahrungsaustausch, (...) Supervision, (...) praktische Beratung, (...) pädagogische Seminararbeit." ("In the support seminars for the 'Balooos', important things happen: (...) exchange of experience, (...) supervision, (...) practical advice, (...) educational seminar work.")</p> <p>"Fast in jeder Sitzung wird ein 'Memo' verteilt und besprochen. Diese Blätter enthalten thematisch verdichtete Informationen zu häufig wiederkehrenden Fragen des Projekts: Was kann ich tun, wenn mein 'Mogli' gemobbt wird? (...) Wie organisiere ich die Zeit der Ferien, damit der Kontakt nicht abreißt? Mein 'Mogli' hat Läuse – was soll ich tun?" ("In almost every session, a 'Memo' is distributed and discussed. These papers contain aggregated information on frequently asked questions about the project: What can I do if my 'Mowgli' is being bullied? (...) How can I organize the vacation periods so that the contact does not break off? My 'Mowgli' has lice – what should I do?") (p. 161)</p>	H. Müller-Kohlenberg (2009): „Mogli“ blüht auf und „Balu“ erwirbt Schlüsselkompetenzen. Die Win Win-Situation im Projekt „Balu und Du“. In: K. Altenschmidt, J. Miller, W. Stark (ed.): Raus aus dem Elfenbeinturm? Entwicklungen in Service Learning und bürgerschaftlichem Engagement an deutschen Hochschulen. Weinheim/Basel, p. 160ff.



Short-term effects	Research object	Effect/size: short-term effects	Source: short-term effects
Time and budget management practice	<i>Balu und Du</i>	Approx. 25% of Baloos learned more about coordination and time and budget management through the program, according to an evaluation of 102 personal reflection reports.	Evaluation of 102 personal reflection reports from Baloos. The evaluation occurred in August 2014 and was sourced from reports of the same year.
Contact with people from different walks of life	<i>Balu und Du</i>	“Studierende begleiten ein Jahr als Mentorinnen und Mentoren ein benachteiligtes Grundschulkind (6 bis 10 Jahre) ...” (“Students accompany a disadvantaged elementary school child (6 to 10 years old) as a mentor for one year...”) (p. 160)	H. Müller-Kohlenberg (2009): „Mogli“ blüht auf und „Balu“ erwirbt Schlüsselkompetenzen. Die Win Win-Situation im Projekt „Balu und Du“. In: K. Altenschmidt, J. Miller, W. Stark (ed.): Raus aus dem Elfenbeinturm? Entwicklungen in Service Learning und bürgerschaftlichem Engagement an deutschen Hochschulen. Weinheim/Basel, p. 160ff.
Additional self-reflection	<i>Balu und Du</i>	“In den Begleitseminaren für die ‘Balus’ passiert Wichtiges: Natürlich berichtet jeder über die Erlebnisse, die Highlights und Probleme der zurückliegenden Woche. Man könnte diese Runden als (...) ‚kasuistische Reflexion‘ (bezeichnen).” (“In the support seminars for the ‘Baloos’, important things happen: each, of course, reports on their experiences, the highlights, and the problems of the preceding week. These meetings could be (characterized) as ‘casuistic reflection’.”) (p. 161)	H. Müller-Kohlenberg (2009): „Mogli“ blüht auf und „Balu“ erwirbt Schlüsselkompetenzen. Die Win Win-Situation im Projekt „Balu und Du“. In: K. Altenschmidt, J. Miller, W. Stark (ed.): Raus aus dem Elfenbeinturm? Entwicklungen in Service Learning und bürgerschaftlichem Engagement an deutschen Hochschulen. Weinheim/Basel, p. 160ff.
	<i>Balu und Du</i>	More than 10% of Baloos reflected on themselves more through the program, according to an evaluation of 102 personal reflection reports.	Evaluation of 102 personal reflection reports from Baloos. The evaluation occurred in August 2014 and was sourced from reports of the same year.

Tab. 12 Medium-term effects for Baloos



Medium-term effects	Research object	Effect/size: medium-term effects	Source: medium-term effects
Increased self-awareness and higher self-assessment	<i>Balu und Du</i>	65% of Baloos have a higher level of self-assessment and more self-awareness as a result of the program, according to an evaluation of 102 personal reflection reports.	Evaluation of 102 personal reflection reports from Baloos. The evaluation occurred in August 2014 and was sourced from reports of the same year.
Greater understanding of children’s experiences	<i>Balu und Du</i>	64% of Baloos have a better understanding of children’s experiences as a result of the program, according to an evaluation of 102 personal reflection reports.	Evaluation of 102 personal reflection reports from Baloos. The evaluation occurred in August 2014 and was sourced from reports of the same year.
Develops professional skills	<i>Balu und Du</i>	48% of Baloos believe that they have developed professionally as a result of the program, according to an evaluation of 102 personal reflection reports.	Evaluation of 102 personal reflection reports from Baloos. The evaluation occurred in August 2014 and was sourced from reports of the same year.
Improved planning and budget management skills	<i>Balu und Du</i>	Balus (N=74) vs. non-Balus (N=208): In the group of Baloos, the component “Arbeitshaltung und Selbstdisziplin” (“attitude towards work and self-discipline”) also arose, which is comprised of the following learned abilities: “Meine Zeitplanung lässt sich meistens realisieren.” (“My scheduling was mostly doable.”) “Ich habe Techniken entwickelt, wie ich den ‘inneren Schweinehund’ (der gern etwas auf die lange Bank schiebt) überwinde.” (“I developed techniques for overcoming the ‘inner couch potato’ (who likes to put things off)”). “Ich weiß im Allgemeinen, welche Arbeitsschritte und Aufgaben ich am nächsten Tag erledigen werde.” (“I generally know what work steps and tasks I will complete the next day.”) (p. 116–117)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und Praxis. 1/2009, p. 111–124.
Better understanding of other people and cultures	<i>Balu und Du</i>	“Es gelingt mir, Verständnis für Personen zu entwickeln, die mir in ihrer Art eigentlich fern sind.” (“I am able to develop an understanding of people who are actually quite different from me.”) Baloos (N=74): approx. 3.5 vs. non-Balus (N=208): approx. 2 (on a 5-step scale).(p. 120)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und
Feelings of loss after the program ends	<i>Balu und Du</i>	Approx. 13% of Baloos indicated feeling sad when the program ended, according to an evaluation of 102 personal reflection reports.	Evaluation of 102 personal reflection reports from Baloos. The evaluation occurred in August 2014 and was sourced from reports of the same year.



Tab. 13 Long-term effects for BalooS

Long-term effects	Research object	Effect/size: long-term effects	Source: long-term effects
Increased sense of congruence	External	Social work as identity work: "Gerade für Heranwachsende liefert das Freiwilligenengagement nicht nur Gelegenheitsstrukturen für die Identitätsfindung als Bürger, sondern auch ein Experimentierfeld für die eigene Identitätsarbeit und den Erwerb von Lebenskompetenzen, die in der Reichweite und Nachhaltigkeit der Lernprozesse oft weit über das hinausreichen, was formelle Lernorte vermitteln" ("For adolescents in particular, volunteering not only provides an opportunity to forge an identity as a citizen, it also offers a experimentation field for their own identity work and the acquisition of life competencies, which often go far beyond what formal learning venues offer in reach and sustainability of learning processes.") (p. 128–129)	M. Brandstetter, M. Vysloulzil (ed.) (2010): Soziale Arbeit im Wissenschaftssystem. Wiesbaden, p. 128–129.
More empathy and mindfulness	Balu und Du	"Ich bemerke, wenn jemand ein bisschen Zuspruch benötigt." ("I notice if someone needs a bit of encouragement.") BalooS (N=74): approx. 3.5 vs. non-BalooS (N=208): approx. 1.9 (on a 5-step scale). (p. 118)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und Praxis. 1/2009, p. 111–124.
Greater sense of responsibility for the community	Balu und Du	"Es geht um das Engagement für das Gemeinwesen, für Hilfsbedürftige oder jedenfalls Adressaten außerhalb des eigenen Selbst. Die Erfahrung, dass der Sinn des Lernens nicht nur im eigenen Fortkommen oder in der Karriere besteht, sondern in einem Beitrag für das soziale Gefüge (hier: im näheren Umfeld), fördert höchstwahrscheinlich die Bereitschaft zur Verantwortungsübernahme – auch in späteren beruflichen Kontexten." ("It is about volunteering for the community, for those who need help, or at least for recipients other than oneself. The experience that the purpose of learning does not just lie in a person's own development or career, but also in contributing to the fabric of society (here: in nearby surroundings) most likely supports willingness to take on responsibility – also in later professional contexts.") (p. 122)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und Praxis. 1/2009, p. 111–124.
Increased professionalization (future teachers)	Balu und Du	"Es gelingt mir, mit Funktionsträgern Kontakt zu knüpfen, um Pläne in die Tat umzusetzen." ("I am able to make contact with officials to put plans into action.") BalooS (N=74): approx. 3.0 vs. non-BalooS (N=208): approx. 1.0 (on a 5-step scale). (p. 119)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und Praxis. 1/2009, p. 111–124.
Better conflict management abilities	Balu und Du	"Ich habe erlebt, dass sich im Umgang mit verschlossenen Personen Durchhaltevermögen lohnt" ("I have experienced that perseverance is valuable when dealing with closed-off people.") BalooS (N=74): approx. 4.0 vs. non-BalooS (N=208): approx. 1.8 (on a 5-step scale). (p. 120)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und Praxis. 1/2009, p. 111–124.
	Balu und Du	BalooS (N=74) vs. non-BalooS (N=208): In the group of BalooS, the component "Kommunikation in schwierigen Situationen/Krisenmanagement" ("communication in difficult situations/crisis management") also arose, which is comprised of the following learned abilities: "Wenn in einer Arbeitsgruppe unterschiedliche Meinungen aufeinandertreffen, gelingt es mir, meine Vorstellungen durchzusetzen" ("If various opinions come together in a work group, I am able to get my ideas across") "Ich erkenne frühzeitig, wenn in einem Arbeitsentwurf ein Risiko steckt." ("I can recognize early on if a work plan has a risky element to it.") (p. 117)	



Tab. 14 Impact for Baloos

Impact	Research object	Effect/size of impact	Source: impact
More civic engagement	Balu und Du	Approx. 15 Baloos have become location coordinators.	Report from the Balu und Du e.V. office in Cologne
	Balu und Du	Most Baloos (approx. 53%) keep mentoring Mowglis for at least six months after the program officially ends.	H. Bartl, S. Drexler, C. Weniger, H. Müller-Kohlenberg (2012): Studie zur Nachhaltigkeit der Wirkung des Mentorenprogramms „Balu und Du“. Osnabrück.
Better mental well-being and physical health	External	“Ehrenamtlich tätige junge Erwachsene wiesen demnach nach zehn Wochen geringere Entzündungs- und Cholesterinwerte sowie weniger Körperfett auf als die Oberschüler der Kontrollgruppe.” (“After 10 weeks, the students who volunteered had lower levels of inflammation, cholesterol, and lower body fat than students in the control group.”)	Study of 53 high school students carried out by researchers from the University of British Columbia and published in the US journal “Journal of the American Medical Association” (JAMA). Cited in: Wer anderen selbstlos hilft, hält sein Herz gesund. In: Die Welt online.
	External	“... respondents who volunteered for a total of approx. 40 hours over the past year were less likely to die over the next seven-and-a-half years than those who didn't volunteer at all.”	Study from the University of Michigan: A little volunteering can prolong your life in “Journal of Gerontology: Social Science”. Cited in: Wer anderen selbstlos hilft, hält sein Herz gesund. In: Die Welt online.
Better pedagogical skills (for future teachers)	Balu und Du	Baloos learn that people can impart knowledge in everyday life, and that a clever educator tries not to work in a “teacher-like” way: “Man kann auch etwas lernen, ohne dass es bewusst wird.” (“People can also learn something without being aware of it.”) Baloos (N=74): approx. 4.0 vs. non-Baloos (N=208): approx. 2.2 (on a 5-step scale). (p. 119)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und Praxis. 1/2009, p. 111–124.
Better parenting abilities	Balu und Du	“Ich bemerke, wenn jemand ein bisschen Zuspruch benötigt.” (“I notice if someone needs a bit of encouragement.”) Baloos (N=74): approx. 3.5 vs. non-Balals (N=208): approx. 1.9 (on a 5-step scale). (p. 118)	M. Szczesny, G. Goloborodko, H. Müller-Kohlenberg (2009): Bürgerschaftliches Engagement als „additives Modell“ zum Erwerb von Schlüsselkompetenzen: Welche Kompetenzen können im Mentorenprojekt „Balu und Du“ erworben werden? In: SQ-Forum. Schlüsselqualifikationen in Lehre, Forschung und Praxis. 1/2009, p. 111–124.

Additional data for the SROI calculation

Tab. 15 Simulation example of better vocational training of a Mowgli⁸⁹

	Males with an immigrant background = <i>Balu und Du</i> has no effect on the participants in the extreme group	Males overall = <i>Balu und Du</i> has a moderate effect on the participants in the extreme group	Males without an immigrant background = <i>Balu und Du</i> has a strong effect on the participants in the extreme group
Without a lower secondary school diploma and without a professional qualification Proportion of the male population aged between 25 and 35 years old in the respective groups	8%	4%	2%

Tab. 16 Data for school-to-work transition system calculations⁹⁰

Whereabouts of general school graduates (those who are not eligible to study) in the period from three to 36 months after school has finished

Cluster description	Direct transition to on-the-job training	Relatively fast transition to training (not on-the-job)	Problematic, lengthy, or unsuccessful transitional processes	Scholastic higher qualification	Delayed but ultimately successful transition
Proportion of graduates who are not eligible to study per cluster	38%	18%	20%	10%	14%
Time spent in school-to-work transition system	0 months	2.2 months	16 months	1.2 months	10.4 months

Tab. 17 Data on the recipients of the unemployment benefit II (Hartz IV) and social welfare included in the calculation⁹¹

Age group	Without a positive effect: Hartz IV average of people with an immigrant background		With a moderate effect: Hartz IV average of the total population		With a strong effect: Hartz IV average of people without an immigrant background	
	Proportion of male Hartz IV recipients	Proportion of female Hartz IV recipients	Proportion of male Hartz IV recipients	Proportion of female Hartz IV recipients	Proportion of male Hartz IV recipients	Proportion of female Hartz IV recipients
35–45 years	9.35%	9.81%	5.60%	5.65%	4.49%	4.34%
45–55 years	10.19%	9.16%	5.71%	4.76%	4.81%	3.91%
55–65 years	13.00%	10.42%	6.06%	4.58%	4.80%	3.47%

⁸⁹ Source: Statistisches Bundesamt: Bevölkerung und Erwerbstätigkeit. Bevölkerung mit Migrationshintergrund – Ergebnisse des Mikrozensus 2011.

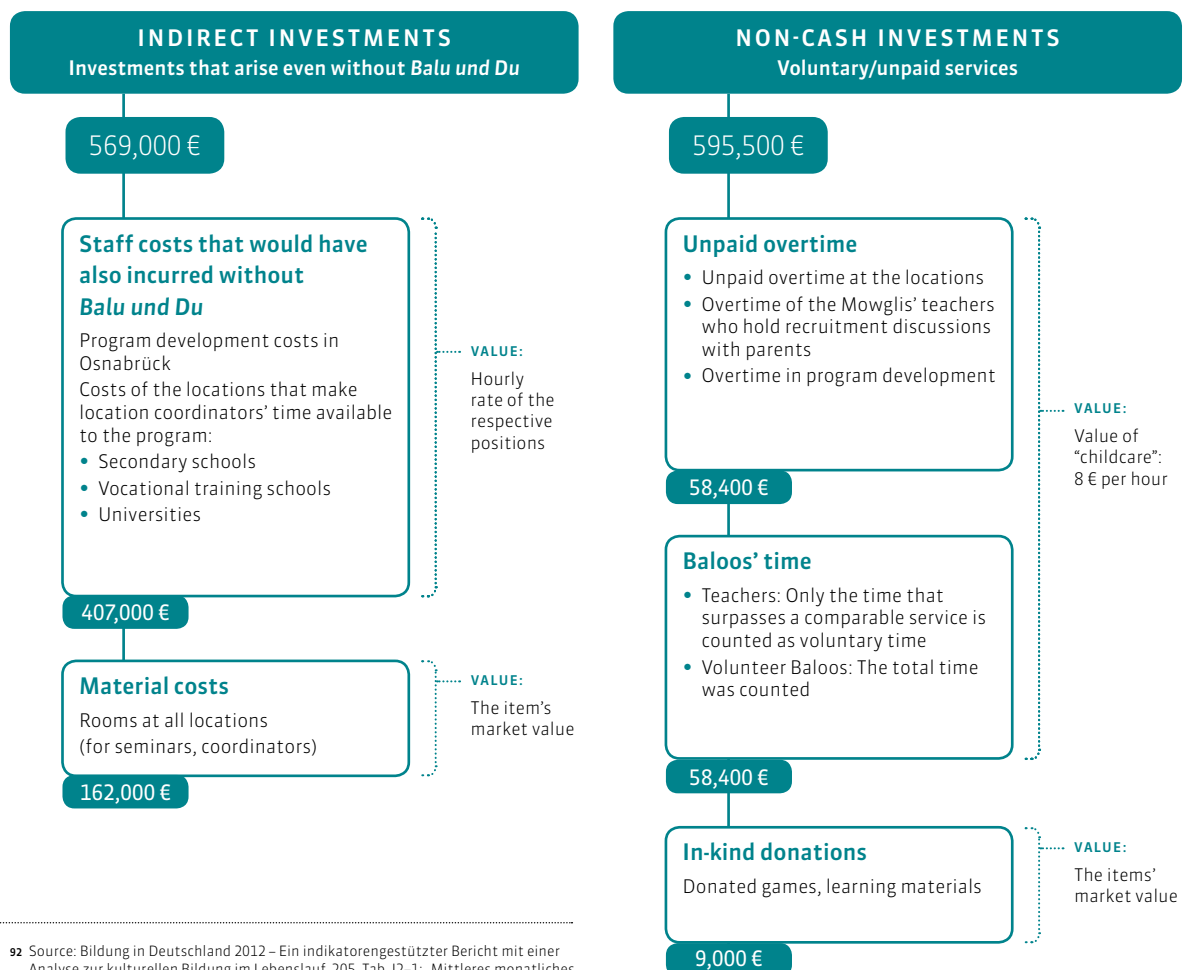
⁹⁰ Source: Ulrich, J. G.: Jugendliche im Übergangssystem – eine Bestandsaufnahme, 17.

⁹¹ Source: Statistisches Bundesamt: Bevölkerung und Erwerbstätigkeit. Bevölkerung mit Migrationshintergrund – Ergebnisse des Mikrozensus 2011.

Tab. 18 **Income data included in the calculation**⁹²

Gross monthly income according to education and/or training qualification (2010)

Professional education groups	Males	Females
Without a lower secondary school diploma and without a professional qualification	2,300.00 €	1,500.00 €
With a lower secondary school diploma and without a professional qualification	2,450.00 €	1,800.00 €
With a lower secondary school diploma and a professional qualification	2,600.00 €	2,100.00 €
With an intermediate secondary school diploma	2,320.00 €	1,643.00 €
With an intermediate secondary school diploma and professional qualification	2,700.00 €	2,138.00 €
With an entrance qualification for higher education, technical college, or trade school	2,500.00 €	2,185.00 €
With an entrance qualification for higher education, technical college, or trade school and a professional qualification	3,200.00 €	2,400.00 €
With higher education, technical college, or trade school qualification	4,185.00 €	3,105.50 €




Fig. 36 **Calculating indirect and non-cash investments**

⁹² Source: Bildung in Deutschland 2012 – Ein indikatorengestützter Bericht mit einer Analyse zur kulturellen Bildung im Lebenslauf, 205, Tab. 12-1: „Mittleres monatliches Bruttoeinkommen vollzeitbeschäftigter Erwerbstätiger im Alter von 25 bis unter 65 Jahren nach allgemeinbildendem und beruflichem Abschluss und Geschlecht (2010)“ (Average monthly gross income of full-time employed persons between the ages of 25 and under 65 years of age, according to general and professional qualifications and gender“).

Tab. 19

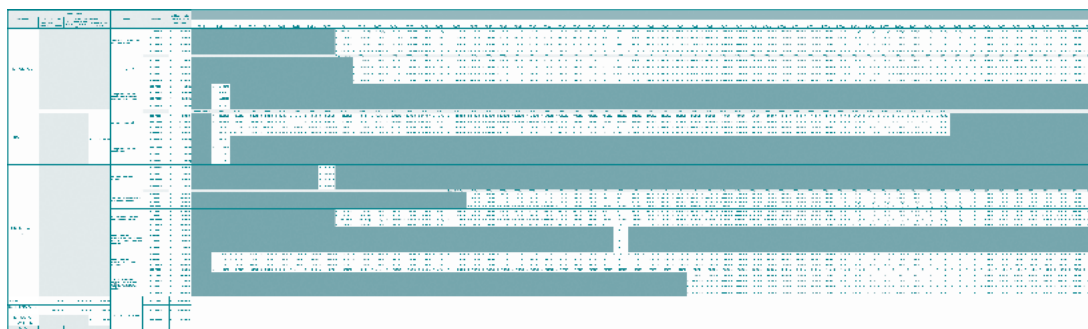
Detailed SROI calculation (overview)

Detailed breakdown of investments and value created per stakeholder

Stakeholder	Investments			Impact	Scenario	Added societal value in 2014 euro value
	Direct investments	Indirect/non-cash investments				
	Expenses incurred as a result of the program	Investments that arise even without Balu und Du	Voluntary/unpaid services			
MOWGLIS 	—	—	—	Higher level of education and better job prospects	SCENARIO 1	459,500
					SCENARIO 2	615,200
					SCENARIO 3	689,300
					SCENARIO 4	922,800
				More civic engagement	SCENARIO 1	711,100
					SCENARIO 2	782,300
					SCENARIO 3	1,137,800
					SCENARIO 4	1,251,600
				Feelings of loss after the program ends or the Mowgli terminates the partnership	SCENARIO 1	-4,400
					SCENARIO 2	-2,200
					SCENARIO 3	-2,200
					SCENARIO 4	-1,100
BALOOS 	—	—	528,100	More civic engagement	SCENARIO 1	919,800
					SCENARIO 2	1,011,700
					SCENARIO 3	1,471,600
					SCENARIO 4	1,618,800
				Feelings of loss after the program ends	SCENARIO 1	-2,500
					SCENARIO 2	-800
					SCENARIO 3	-800
					SCENARIO 4	-300
PUBLIC SECTOR 	—	—	—	Less time spent in the school-to-work transition system (Mowglis)	SCENARIO 1	11,500
					SCENARIO 2	15,400
					SCENARIO 3	17,200
					SCENARIO 4	23,100
				Lower rates of unemployment among former Mowglis	SCENARIO 1	318,800
					SCENARIO 2	416,800
					SCENARIO 3	478,200
					SCENARIO 4	625,100
				More tax revenues resulting from the former Mowglis	SCENARIO 1	631,200
					SCENARIO 2	844,700
					SCENARIO 3	946,700
					SCENARIO 4	1,267,100
				Better mental health of Mowglis: Fewer costs regarding inpatient treatment of addiction problems	SCENARIO 1	4,000
					SCENARIO 2	5,300
					SCENARIO 3	5,900
					SCENARIO 4	7,900
				Better mental health of Mowglis: Fewer cases of depression	SCENARIO 1	36,500
					SCENARIO 2	72,900
					SCENARIO 3	58,300
					SCENARIO 4	116,700
				Better physical health of Mowglis: Fewer long-term healthcare costs due to Mowglis leading healthier lifestyles	SCENARIO 1	59,500
					SCENARIO 2	71,500
					SCENARIO 3	119,100
					SCENARIO 4	142,900
LOCATIONS	529,600	493,500	57,900	ADDED SOCIETAL VALUE (TOTAL)	SCENARIO 1	3,145,000
BALU UND DU e. V.	209,000	75,400	6,100		SCENARIO 2	3,832,700
MOWGLIS' TEACHERS			3,400		SCENARIO 3	4,921,300
TOTAL INVESTMENTS	738,600	569,000	595,500		SCENARIO 4	5,974,600

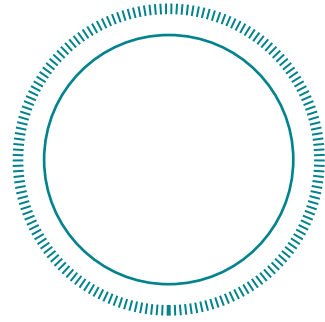


Detailed SROI calculation (download)



The complete Excel table can be downloaded via the following link:
http://www.valueforgood.com/publications/SROI_Calculation_BuD2014_EN2017.xlsx





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