

# Performative evaluation and social return on investment: potential in innovative health promotion interventions

Julie Gibson, Anita Jones, Helen Travers and Ernest Hunter

**Objective:** *The purpose of this study was to describe an approach to evaluation of a project involving complex health behaviours that incorporates collateral social outcomes.*

**Method:** *Evaluation challenges and responses for an innovative information and communication technologies for development (ICT4D) initiative (HITnet) operating in remote Indigenous Australia are presented.*

**Conclusions:** *Innovation in evaluation must match innovation in project design and application. Two methodologies – performative research, and social return on investment – as proposed for a HITnet, sexual health promotion project, are considered.*

**Key words:** *evaluation, health promotion, information and communication technologies, social return on investment.*

## INTRODUCTION

HITnet is the Health Interactive Technology Network, a Cairns-based national program auspiced through the University of Queensland providing health information services to improve health literacy to disadvantaged populations via community-participatory projects ([www.hitnet.com.au](http://www.hitnet.com.au)). These projects produce interactive media learning modules, which HITnet broadcasts over a nationwide touchscreen kiosk network. From its inception in 2001, HITnet has investigated ways to evaluate its projects to provide both external stakeholders and the HITnet team with feedback on the planned and collateral outcomes of its projects.

This paper examines the challenges of evaluating HITnet projects where the outcomes are predominately social returns, and details a proposed solution to these challenges based on one of its projects; the sexual health module *Kaiyai girl*. The evaluation solution focuses on the use of performative research and the application of social return on investment methodology.

## BACKGROUND AND NATIONAL EXPANSION

The HITnet program vision is to establish itself as a digital social enterprise and leader in the delivery of technology-mediated health and information services to populations in need in Australia. The HITnet platform consists of interactive media content, managed and distributed via a custom-designed web-based application suite. The content is broadcast on touchscreen kiosks that were initially located in health centres in urban, regional and remote Indigenous communities, but also now in correctional centres, schools and youth drop-in centres. The content attracts, engages

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### Julie Gibson

Technical Manager, HITnet, Cairns, QLD, Australia.

### Anita Jones

Creative Media Consultant, HITnet, Cairns, QLD, Australia.

### Helen Travers

Program Director, HITnet, Cairns, QLD, Australia.

### Ernest Hunter

Public health/mental health consultant, Cairns QLD, Australia.

**Correspondence:** Helen Travers, Program Director, HITnet, PO Box 6515, Cairns, 4870 Queensland, Australia  
E-mail: [helen@hitnet.com.au](mailto:helen@hitnet.com.au)

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and delivers key health messages via “choose your own adventure”, choice/consequence, interactive media. Users navigate through the stories by interacting with the kiosk’s touchscreen, with each touch logged to create usage data. HITnet endeavours to make content relevant, culturally appropriate, and to build capacity locally by basing the productions within communities and returning to celebrate the production launch with the community.

Following an initial proof-of-concept study in two Queensland sites<sup>1</sup> and subsequent rollout of four kiosks in Cape York in 2005, grassroots demand has resulted in expansion to the current network of 70 kiosks in Queensland, Western Australia, South Australia and the Northern Territory (Figure 1). The expansion of the service has led not only to a broader audience, but also to an increased number of stakeholders.

The requests for HITnet services are driven by community needs and government priority. HITnet views its primary stakeholders as those who seek information from the touchscreen kiosk and the community-based participants of its content development projects. Other stakeholders are funding bodies, health professionals, researchers and the HITnet team itself, all of whom bring different expectations and requirements in terms of evaluation.

## EVALUATION CHALLENGES

HITnet operates in a social environment with routine reporting responsibilities to stakeholders, from Indigenous community groups to government and corporate organisations, attempting to do so in ways that are meaningful to each. How to generate useful evaluation data has been an ongoing challenge<sup>2,3</sup> which requires clearly understanding: (i) the outcomes of HITnet work; (ii) the social environment it works within, and: (iii) the history of evaluation to date.

## HITNET OUTCOMES

Each HITnet project has unique outcomes identified and agreed upon in the project’s scoping documentation which at the highest level of all projects involves the following:

- delivery of specific health information that improves health literacy and encourages healthier life choices;
- culturally appropriate production processes;
- development of engaging, interactive media resources;

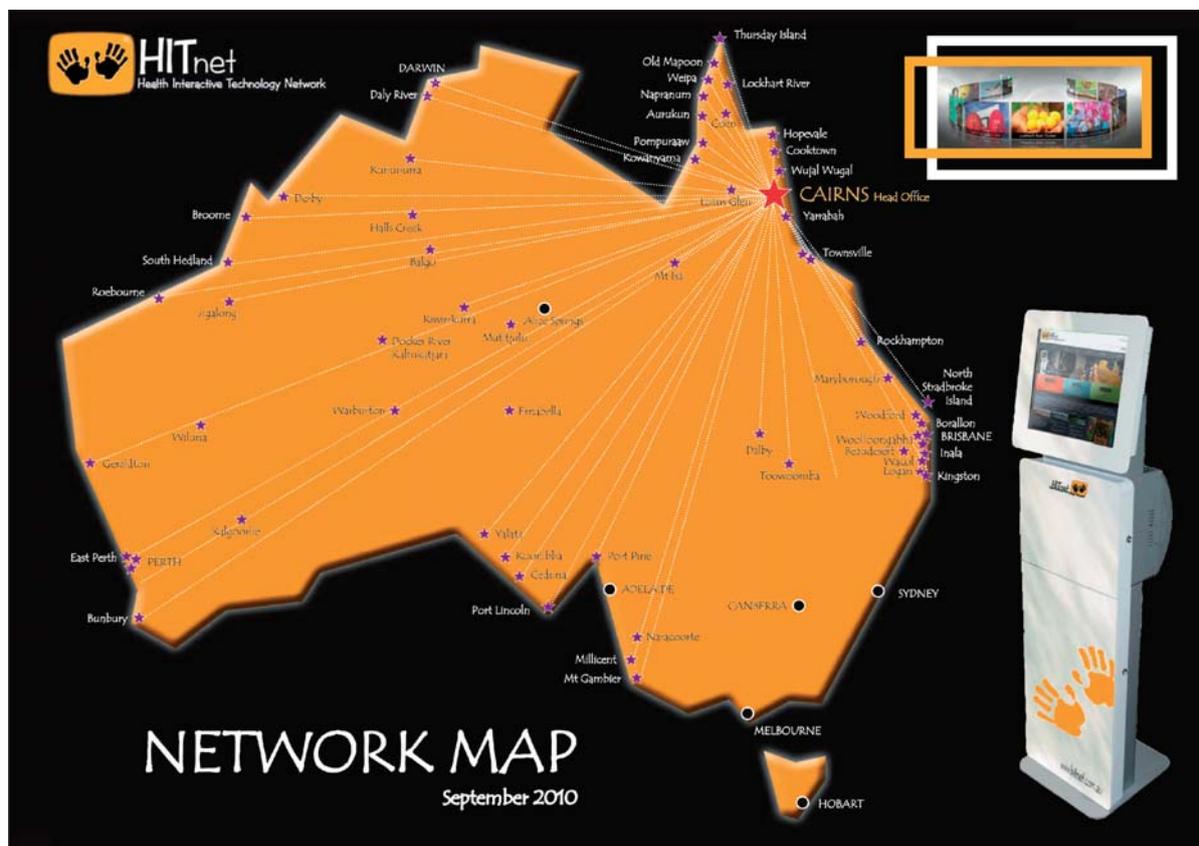


Figure 1: National HITnet Network, September 2010.

- skills and opportunity transfer via employment of local cast and crew;
- social and emotional wellbeing impact through creative expression, inclusion and connectedness, and a sense of pride and confidence;
- delivery on time, on budget and to scope.

## HITNET ENVIRONMENT AND CHALLENGES

Because HITnet is but one of many initiatives seeking to enhance Indigenous health (from local projects to Federal policy) and because most of the pressing health and social issues besetting that population are the result of a complex interplay of social forces, isolating the effects of HITnet's work is daunting. Kiosks and the community-based production of content modules are often located in communities with few resources to cope with major social and health problems. Consequently, collecting data from participants and service providers demands being attuned to privacy, local sensitivity to particular health issues, motivation to participate in providing information, limited resources, and competing demands in environments of social adversity (see "Challenges" at [www.hitnet.com.au/kaiyaigirl/](http://www.hitnet.com.au/kaiyaigirl/)).

## EVOLUTION OF HITNET EVALUATION

The need to generate data on the use of the HITnet content and kiosks was recognized during the early software design stages, and usage data collection was incorporated as a function in the HITnet software to provide statistics on daily use of modules by gender and age range at content level and by kiosk location.

To exemplify, usage data from a community-based sexual health production, *Put It On*, enabled the HITnet team to assess the value of rich media content and community-based participation to increase local kiosk use, and of using the choice and consequence story options to explore behaviour and resulting consequences.<sup>4</sup> However, usage data alone does not allow confirmation that HITnet activities convert to improvements in health literacy and subsequent healthier life choices. Consequently, HITnet has adopted qualitative research methods, interviewing participants and surveying key informants.

With increasing pressure on resources and demands for cost effectiveness, HITnet has also explored the challenges to such analyses<sup>3</sup> and costed information access per end user for specified topics.<sup>5</sup> However, the challenge remains to link this information with health outcomes, and to incorporate collateral social outcomes. However, while gathering input (budget) data is easily measurable, social outcomes such as employment opportunities, connectedness, pride and

confidence are not evident from project management budgets alone.

## CHOOSING AN EVALUATION METHODOLOGY (OR TWO)

Two years ago the HITnet team summarized the evaluation challenge ahead of HITnet<sup>2</sup> as: "to develop evaluation strategies that are not only capable of identifying social and health outcomes but which match the ingenuity and innovation of the interventions with methodologies that recognize participation and creativity" (p. 158). The unique nature and evolution of HITnet has been such that to better grapple with evaluation challenges and to consider the broader social impacts, the team has explored alternative methods of research in the form of performative research (PR) and the social return on investment (SROI). HITnet will pilot both evaluation methodologies by applying them to one project so that if deemed suitable this evaluation framework can be incorporated into other projects and, ultimately, the HITnet program as a whole.

## PILOT EVALUATION: *KAIYAI GIRL* PRODUCTION

The project chosen for applying these evaluation methodologies is *Kaiyai girl* as this is HITnet's first production to include the parallel production of a documentary based on a digital record captured over the year from conceptualization to community launch – *Making of Kaiyai girl* – from which the web-based links in this article are drawn. Shot in Broome in 2008, the production of *Kaiyai girl* was facilitated by HITnet and Frontier Documentaries (Melbourne, Victoria), but managed by local organizations. All of the actors and crew were locally sourced, and for most this was their first video production experience, providing much scope for local capacity building. Based on an earlier successful module, *Put it on*, shot in north Queensland, the *Kaiyai girl* story is about a vibrant and somewhat flirtatious, teenage girl who is attending a party with her friends and who has to make choices about drugs, alcohol, safe sex and whether to visit the clinic after unsafe sex.

## *KAIYAI GIRL*: PERFORMATIVE RESEARCH

Performative research is multi-method, practice-led research that has been proposed not only in relation to artistic practice, but also, as Haseman<sup>6</sup> notes, by researchers "involved in content creation and production across the creative and cultural industries, especially those engaged in user-led and end-user research" such as digital and online user-engagement initiatives and applied commercial research. In contrast to quantitative and qualitative approaches it is: "expressed in

nonnumeric data...in forms of symbolic data other than words in discursive text. These include material forms of practice, of still and moving images, of music and sound, of live action and digital code" (p. 6). That is, these products can be regarded as "texts" amenable to qualitative analysis.

Performative research presents opportunities for HITnet, not only because outcomes from engagement with a creative end-product and participation in the creative process are of interest, but also because both the product and the documentary record of the process exist in digital form, the latter also enabling feedback to HITnet's primary, community-based stakeholders for whom learning is often facilitated more effectively through seeing and listening, than literacy-reliant reading.<sup>7</sup> This "taking back", in turn, provides a means of assessing whether the documentary reconstruction accurately represents the experiences of those participating in and observing the process (to see an excerpt from *Kaiyai girl* with local lead, band and supporting cast go to "Party scene" at [www.hitnet.com.au/kaiyaigirl/](http://www.hitnet.com.au/kaiyaigirl/)).

### **KAIYAI GIRL: SOCIAL RETURN ON INVESTMENT METHODOLOGY**

SROI methodology has its roots in social accounting and cost benefit analysis. It distinguishes itself from other outcomes-based approaches by placing a monetary value on outcomes, which allows a comparison between the value of outcome/s against the value of investment.

SROI measures change in ways that are meaningful to the people or organizations that experience or contribute toward the change: "It tells the story of how change is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them" ([www.socialimpactscotland.org.uk](http://www.socialimpactscotland.org.uk)). The key assumption of SROI analysis is that there is more to value creation than purely economic value. The value creation process should be thought of as a continuum with such economic value at one end, socioeconomic value somewhere in the middle, and social value at the other end. Using the SROI methodology, a ratio of benefits to costs can be calculated. The analysis provides information which can form the basis of decision making, case studies, qualitative, quantitative and financial reporting.

The SROI network ([www.thesroinetwork.org](http://www.thesroinetwork.org)) is a lead body in the UK for SROI methodology, which is endorsed by the UK Office of the Third Sector. After attendance at an accredited SROI training by the HITnet technical manager (J.G.), SROI was determined an appropriate methodology for HITnet projects as it enables HITnet to derive value from its social outcomes, report on project value to stakeholders, and give confidence to future investors of the returns they can expect. HITnet also considers that by embedding the

evaluation framework into projects it will ensure the focus on stakeholder needs is maintained.

SROI can encompass all types of outcomes – social, economic and environmental – but it is based on involving stakeholders in determining which outcomes are relevant. There are two types of SROI:

- Evaluative SROIs are conducted retrospectively and are based on outcomes that have already taken place;
- Forecast SROIs predict how much social value will be created if the activities meet their intended outcomes.

In the case of *Kaiyai girl* HITnet can perform an evaluative SROI analysis, with the benefit of collecting data from the production phase of the project in the form of performative evidence of the digital record, *Making of Kaiyai girl*, video segments.

The seven key principles of SROI are:

1. Involve stakeholders – performed throughout the whole SROI process with a focus on those experiencing significant change from the activity.
2. Understand what changes – from the point of view of the stakeholder.
3. Value the things that matter.
4. Only include what is material – use judgement to include what's relevant and significant.
5. Do not overclaim – think about what would have happened if the activity hadn't occurred.
6. Be transparent – what has been included and what hasn't, acknowledge partiality and assumptions.
7. Verify the result.

The methodology involves the following stages:

1. Establishing scope and identifying key stakeholders.
2. Mapping outcomes: what happens as a result of an activity from the point of view of stakeholders.
3. Establishing impact: having collected evidence on outcomes and monetized them, those aspects of change that would have happened anyway or are a result of other factors, are eliminated from consideration.
4. Reporting, using and embedding: sharing findings with stakeholders and responding to them, embedding good outcomes processes into the organization and verifying the report.

The HITnet evaluative SROI involves examining a project in terms of "activity" (what) and "purpose" (why). In the example of *Kaiyai girl* the "activity" is the production of a sexual health interactive learning resource, and the production process and impact on client audience. The "purpose of analysis" is to demonstrate the value created by the community-based production process utilizing an "impact map", an SROI tool used to record findings and keep track of the process

([http://www.socialimpactscotland.org.uk/methods-and-tools-/sroi-measurement-method/how-to-complete-an-impact-map-\(1\).aspx](http://www.socialimpactscotland.org.uk/methods-and-tools-/sroi-measurement-method/how-to-complete-an-impact-map-(1).aspx)).

## STAKEHOLDER CONSULTATION

SROI is about the experience of stakeholders and understanding what changes occur for them as a result of project activities (in this case, HITnet). Stakeholders can be selected according to their experience of change. In the case of *Kaiyai girl* data can then be gathered on what those stakeholders contributed to the activity (the *Kaiyai girl* production process), what outputs were generated by the activity, and what outcomes or changes they experienced as a result of participation in the activity (see “Content development team” at [www.hitnet.com.au/kaiyaigirl/](http://www.hitnet.com.au/kaiyaigirl/)).

The SROI process then evidences outcomes using indicators to measure changes. Good outcome indicators (objective or subjective) usually capture changes in behaviour for stakeholders. Indicators are determined in consultation with stakeholders to ensure that the indicator used is something they recognize as being appropriate to the outcome they report. For example, outcome: “experience working on the production”; indicator: “gained new skills that can be used in the future”.

## DETERMINING VALUE

SROI is about value rather than money and therefore requires determining a financial proxy that is relevant to the stakeholder and adequately communicates the value that they place on the change they experience. For example, the on-the-job training that the locally recruited HITnet production crew experienced, which they didn’t have to pay for and which can then be used to gain other, possibly better paid employment (see “Capacity building” at [www.hitnet.com.au/kaiyaigirl/](http://www.hitnet.com.au/kaiyaigirl/) and “Opportunities” at [www.hitnet.com.au/kaiyaigirl/](http://www.hitnet.com.au/kaiyaigirl/)).

Further, HITnet needs to understand how much of the value identified was a result of the project’s activities, and how much would have happened anyway. To do this HITnet must consider what is happening to certain stakeholder groups elsewhere (through national statistics as well as other benchmarking information), and to understand, through stakeholder consultation, who else has influenced the change reported. This information is then taken away from the outcomes reported to reveal the true impacts of HITnet activity on a stakeholder group, keeping in mind the SROI method stipulates not over-claiming the project-generated value.

For HITnet, the final SROI report will be incorporated with PR data into the stakeholder project-reporting process so that primary stakeholders, investors and funders can see the types of returns HITnet is able to achieve. At a program level HITnet also uses the

evaluation results to support decision making, strategic planning and organizational learning.

## DISCUSSION

The HITnet program has its origins in a research-based project, therefore the value of evaluation has always been recognized. Evaluation techniques have developed over the last decade, much as HITnet productions have evolved. The initial evaluation of usage data generated discussion on the social outcomes of the program and how best to measure them. The evolution of HITnet content into community participation productions has further supported adoption of practice-based PR to evaluate the outcomes of community-based projects, and further investigations have led to considering piloting SROI methodology to measure the value of social outcomes of HITnet projects.

While HITnet is yet to fully implement this evaluation strategy it will continue to develop close partnerships with health providers to identify correlation between HITnet data and health statistics, both for evaluation and to identify priority health issues that can be addressed by HITnet content and projects. With the adoption of this performative/qualitative hybrid of research paradigms HITnet seeks to develop evaluation strategies that match the ingenuity and innovation of its health promotion interventions with methodologies that respect the value of community participation and creative expression (see “Community-based launch” at [www.hitnet.com.au/kaiyaigirl/](http://www.hitnet.com.au/kaiyaigirl/)).

## DISCLOSURE

The authors report no conflicts of interest. The authors alone are responsible for the content and writing of the paper.

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