

Version published March 2020

SOCIAL VALUE MANAGEMENT CERTIFICATE

Criteria and Evidence Form

Level 1 - Commit

# About the Social Value Certificate

# The Social Value Management Certificate is looking at the standard of an organisations practice in managing the social value that is created (and destroyed) through its activities. This is not only about reporting social value, it is about gathering data, analysing it, and making better informed decisions to improve your stakeholders lives through creating the most social value that you can with your resources. It does not provide proof or a statement that your organisation or programme is creating a particular amount of social value, more that you are putting practice in place to continuously improve the amount of value you are creating.

# The Social Value Management Certificate is an organisational pathway and there should be an explicit expectation when undertaking this journey that decision making, and organisational activities will change throughout.

The Social Value Management Certificate can be awarded to an organisation or a specific programme or project being run by an organisation. The Social Value Management Certificate has three levels:

The Social Value Management Certificate has been developed by Social Value International as part of their assurance and accreditation services. The SVI Framework and Social Value Principles form the basis for the certification. (https://socialvalueint.org/social-value/standards-and-guidance/ )

# Levels of the Social Value Management Certificate

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| **The Three Levels of the Social Value Certificate** |
| **Level 1** | **Commit** | An organisation or programme must demonstrate a commitment to embedding the SVI Framework and Social Value Principles into its policies and practices, supported by senior management and/ or the board. This means an explicit commitment to managing the social value being created in the organisation for all stakeholders. |
| **Level 2** | **Implement** | The organisation or programme must show that the commitment to managing social value in alignment to the SVI Framework and embedding the Social Value Principles is being implemented into the organisational practice. This will include evidence of data that has been collected. |
| **Level 3** | **Manage** | The organisation or programme must demonstrate that social value is being managed with an aim to maximise the value that is being created within the organisation’s available resources for all stakeholders. This means social value data is being used in organisational decision making continuously and systems and processes are being reviewed and improved. |

 There are three levels of certification:

The levels must be worked through sequentially. An organisation or programme cannot achieve Level 3 without having first achieved Level 1 and Level 2, or Level 2 without first achieving Level 1.

Each level is awarded for two years, with a check in after one year. At the end of the two year period the applicant organisation or programme should move on to the next level. If they are not ready to progress but are able to demonstrate that they are making progress towards the next level, they may be awarded a one-year extension of their current certificate level.

Organisations or programmes that reach Level 3 must renew their certificate bi-annually.

# Evidence for Level 1

This document sets out the criteria required for an organisation or programme to achieve Level 1 of the Social Value Management Certificate. Applicants must provide evidence that demonstrates a commitment to each of the criteria listed below. This could be in the form of an organisational strategy, policy documents, board approved minutes, an action plan or project plan, or any other planning documents an organisation may use. This must be agreed, signed off or ratified by both identified Social Value Representatives. Please note against each point how your organisation or programme has met the criteria and the evidence you have provided. You should then submit both this completed document along with your supporting evidence. You can do this by uploading the files to our online application form. If you have any issues please reach out to the team at info@socialvalueuk.org .

Details of Applicant

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| **Organisation Name** |  | **Website** |  |
| **Social Value Lead Contact Name (person responsible for implementing)** |  | **Social Value Lead Contact email** |  |
| **Social Value Senior Leader Name** |  | **Social Value Senior Leader contact details** |  |
| **Country based in** |  | **Countries operating in** |  |
| **Membership of Social Value International?** |  | **Organisation/Programme applying**  |  |
| **Overview of organisations operations** |  |

# Criteria and evidence checklist for Level 1

## Stage 1: Creating Capacity

**Creating Capacity -** this pre-stage is asking for your organisation to build internal capacity so that you have the capability to manage your social value over time

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| **L1 Criteria No** | **Summary of criteria** | **CommitMy organisation commit to…** | **Evidence –****TO BE COMPLETED BY APPLICANT**  | **Feedback** |
| 1.CC.1 | **The organisation is encouraged to build internal capacity for managing social value** | Create a plan for skill development of staff across all levels including board level for embedding social value management practice into their organisational practice and decision making.  |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.CC.2 | Create organisational commitment to social value management by identifying a social value lead/s and creating a working group/committee/forum with representation from across the organisation. Ideally this should report to board level. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.CC.3 | Produce a policy/action plan that includes commitments to undertake actions in alignment (but not limited to) to all criteria as outlined in the Social Value Management Certificate criteria. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |

## Stage 2: Plan

**Plan** – in this stage you will create (or review) your strategy and business plan which will include an impact management plan and an operations plan. Carry out user research, testing and co-design of products and services.

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| **L1 Criteria No** | **Summary of criteria** | **Commit'My organisation commit to…** | **Evidence –****TO BE COMPLETED BY APPLICANT** | **Feedback** |
| 1.P.1 | **Organisation is encouraged to define the scope of the activities to manage** | Record details of the activities that will fall within the scope of the Social Value Management practice |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.P.2.1 | **The organisation is encouraged to identify and engage with stakeholders**  | Map out all stakeholder groups (including sub-groups) affected or affecting the activities that will be included in the scope of the Social Value Management practice  | Remember to consider the broad stakeholder groups referenced in the Guidance Document.  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.P.2.2 | Develop a plan to engage with representatives of all stakeholder groups identified.  |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.P.3 | **The organisation is encouraged to involve stakeholders in defining the most relevant outcomes** | Involve representatives from all relevant stakeholder groups in the process of understanding and defining all of the relevant **outcomes** that they are experiencing and how these have been produced. These could be positive or negative and open questioning should be used to probe for any unintended outcomes. Engagement will take place in alignment with the stakeholder engagement plan.Make clear which outcomes will then be measured quantitatively. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.P.4 | **The organisation is encouraged to articulate how social value outcomes are produced for their stakeholders (this could be through logic models such as theories of change)** | Describe and record how the social value outcomes are produced by the activities identified in the scope (including positive and negative change) that have been identified for each stakeholder group (this could be through Theories of Change). This should include inputs and outputs. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.P.5 | **The organisation is encouraged to identify intended outcomes, and outcomes that are required for reporting (e.g contractual requirements, policy objectives, or shared measurement frameworks)** | Identify intended outcomes AND outcomes that must be reported on (internally or externally). These could be part of : - a shared measurement framework (i.e SDGs)  - an organisational policy (i.e Equality and diversity policy) - a strategic goal (i.e widening participation, environmental management etc) - contractual requirement (outcomes predefined by contact)Identify any outcomes that need to be reported on or managed.  |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.P.6 | **The organisation is encouraged to set targets for all identified outcomes relevant for measuring and managing** | Set some targets for the outcomes that have been identified as relevant to measure and manage  | This is in reference to the outcomes that have been identified and recorded through criteria points 1.P.3-1.P.5 | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.P.7 | **The organisation is encouraged to record risks associated with the approach to defining which outcomes are to be measured.** | In relation to the Plan stage record or note transparently the limitations of the processes used to define the outcomes that will be measured and managed, specifically noting any limitations with the stakeholder involvement processes. This could include potential biases, limitations in representation, as well as the need for any triangulation with other sources of evidence (could be other stakeholders, or third party research).Manage the risks that are associated with the chosen approach |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |

## Stage 3: Do

**Do** – in this stage you will design surveys and collect quantitative data from stakeholders about the changes they experience, and store and organise the data ready for analysis

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| **L1 Criteria No** | **Summary of criteria** | **Commit'My organisation commit to…** | **Evidence –****TO BE COMPLETED BY APPLICANT** | **Feedback** |
| 1.D.1 | **The organisation is encouraged to select or design metrics for measuring social value of their activities** | Define metrics that will be used to measure amounts of **inputs** (i.e. time and resources), and **outputs** for each activity, and for units and amounts of change for each **outcome.** |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.D.2 | **The organisation is encouraged to collect data on inputs and outputs** | Record amounts of **inputs** (i.e. time and resources), and **outputs** for each activity. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.D.3 | **The organisation is encouraged to collect data on outcomes** | Involve samples from all stakeholder groups to collect following data on the outcomes you have decided to measure.This should include:- numbers of people experiencing change (breadth) - amounts of change for each outcome (depth)  - duration of each outcome - the relative importance (weightings) of the different outcomes experienced. - your contribution to each outcome (deadweight, attribution by others) |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.D.4 | **The organisation is encouraged to provide a rationale for the valuation approach they are using** | Provide a rationale for the approach used to establish the relative importance of outcomes, and how this reflects the preferences and priorities of stakeholders.  | This may or may not include the use of monetary valuation techniques | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.D.5 | **The organisation is encouraged to record risks associated with quantitative data collection processes** | In relation to the Do stage record transparently the limitations and risks of the data collection processes. This could include gaps, potential biases in the data, limitations in stakeholder representation, as well as the need for any triangulation with other sources of evidence (could be other stakeholders, or third-party research) |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |

## Stage 4: Assess

**Assess** – in this stage, you will analyse the data you have collected.

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| **L1 Criteria No** | **Summary of criteria** | **Commit'My organisation commit to…** | **Evidence –****TO BE COMPLETED BY APPLICANT** | **Feedback** |
| 1.A.1 | **The organisation is encouraged to determine the most significant outcomes**  | Review the significance of each outcome, to clarify which are the most important/material ones. This review should be based on actual amounts of change, duration, relative importance and organisations contribution to the outcomes. | This is linked to the data that will be gathered during the 'Do' stage | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.A.2 | **The organisation is encouraged to verify/check the data with stakeholders** | Review and verify the data collected with representatives from the different stakeholder groups |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.A.3 | **The organisation is encouraged to report transparently** | Produce proportionate reports of social value data. These should include: - clear scope of the activities - stated audience and purpose of analysis  - an analysis of the limitations or risks of using the data- performance against targets- recommendations for improved performancePLEASE NOTE: different types of reporting may be needed for internal and external audiences |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.A.4 | **The organisation is encouraged to seek assurance of reports as needed** | When publishing a report / account of social impact / value to external audiences engage an independent third-party review. This could be through a critical friend, peer review, or through a more formal assurance provider. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |

## Stage 5: Revise

**Revise** - with your data and analysis in place, in this stage you will focus on using this as the basis for making decisions that are focused on maximising your impact. In most cases your decisions will come down to choosing between three courses of action: change, stop or scale-up.

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| **L1 Criteria No** | **Summary of criteria** | **Commit'My organisation commit to…** | **Evidence –****TO BE COMPLETED BY APPLICANT** | **Feedback** |
| 1.R.1 | **The organisation is encouraged to assess options for creating more value** | Discuss different options for creating more social impact/ value based on the data collected. Options need to be considered alongside financial, environmental and operational information about the organisation / activity. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.R.2 | **The organisation is encouraged to test options for creating more value with stakeholders** | Consult with the stakeholders that are likely to be / are affected by any proposed changes to activities  |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.R.3 | **The organisation is encouraged to make operational changes to activities** | Implement changes to the organisation’s activities | Changes will be based on review of options based on social value data collected. | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.R.4 | **The organisation is encouraged to record and catalogue the changes made to activities** | Record any changes that are made to activities based on social value data or reasons for not making these changes | Do not expect a separate, special document to record these. The evidence can be in the documents routinely used to record their decisions | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.R.5 | **The organisation is encouraged to revise social value targets** | Review and revise targets for future performance based on the data that has been collected. |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |
| 1.R.6 | **The organisation is encouraged to review and improve the Social Value Management practice** | Review and improve the systems and processes in place across the organisation for managing social value.  |  | **Overall assessment of criteria point:**Does not meet criteriaMore evidence neededCriteria point met |