

## Application for Report Assurance: Terms & Conditions

### *Definitions*

1. In the following terms and conditions, the word 'assurance' will refer to the process of applying for Report Assurance.
2. The assurance process is a principles-based assessment of a written report and an accompanying impact or value map. It is not an audit and will not include independent verification of any primary data collection or third-party research contained within the report.
3. A composite report is defined as a report which considers the social value of more than one product, service or organisation and features multiple impact maps.

### *Making an application*

4. Social Value UK are the assurance provider of the Report Assurance process, providing assurance on behalf of Social Value International.
5. To apply for assurance the applicant must hold a current membership of Social Value International, directly or through a Joint Member Network, before the point of application. To check your networks status please refer to the Social Value International website: <https://socialvalueint.org/our-networks/> .
6. Only report authors can apply for assurance. It is not possible for an organisation to apply for assurance.
  - a. In the case of report assurance all authors must be named on the application form and a lead author nominated. A lead author must be someone with the ability and permission to make any changes to the report subsequently required for assurance.
  - b. The contact details submitted with the application must be those of the report author or lead author.
7. The report will undergo an internal review by the SVUK Assurance Team before progressing to external assessment. There may be circumstances in which an application does not proceed to a full assessment due to significant issues being identified with the report that would make it almost impossible for it to meet the assurance criteria in its current state. Should this circumstance arise, the applicant will be informed that the assessment will not proceed further. The applicant will not be charged the full assurance or accreditation fee but will have to pay a fee of £100 + VAT to cover administration costs.
8. Composite reports are generally not accepted for assessment. However, in some circumstances, and subject to the availability of resources, it may be possible to assess a composite report with additional charges over and above the current assurance fees. Conditions will apply as to the composition, structure and layout of such reports.

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Applicants wishing to have a composite report assessed should contact Social Value UK prior to making an application.

9. Social Value UK will process applications in order of the dates on which they were received. If there are more applications than can be included in one round, priority will be given to applicants in order of application being received, and those who were current members of Social Value International prior to making their application.
10. Applications for assurance must be submitted within the timeframes set out by Social Value UK. The timeframes for Fast Track applications will be determined by the Assurance Manager in collaboration with the applicant.
11. Applications must use the Social Value UK documents released and dated for the appropriate round. The deadline for applications will be 17:00 GMT on the stated closing date.
12. It is the responsibility of the applicant to make sure that all the requirements for application are met.
13. Applications that do not meet all requirements, are not complete or do not meet the stated deadlines will be returned and a new application must be resubmitted.
14. Complete applications that cannot be assessed due to high demand will be retained and given priority in the next round.
15. Applications must be made in English. Feedback (written and verbal) will also be given in English.
16. Results of the application will not be released without confirmed payment.
17. Reports will be assessed using the SVI Report Assurance Standard assessment criteria which are available to download from the Social Value International and Social Value UK websites.
18. The assessment of reports will be undertaken by Social Value International assessors. All assessors are SVI Level 3 Advanced Practitioners. The assessment will be carried out anonymously, without the assessor knowing the name of the report's author/authors, or the report author knowing the name of their assessor.
19. Assessors will treat the reports with complete confidentiality and will not enter into any discussion or communication about the report except for that required by the assurance process between Social Value UK staff and applicants.
20. Social Value UK and Social Value International (the organisations as a whole, and specifically the internal Assurance Teams) will treat the reports with complete confidentiality and will not enter into any discussion or communication about the report except for that required by the assurance process between Social Value UK staff, the report assessor and the applicants.
21. Applicants are entitled to receive up to one hour of verbal feedback from their assessor in addition to the written feedback. Where the verbal feedback is to take place

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over the internet (for example by using Skype) it is the applicant's responsibility to ensure that they have access to the necessary equipment and software. If the verbal feedback is to take place by phone it is the applicant's responsibility to cover the cost of the phonecall.

### *Results*

22. There are three possible outcomes of an application for report assurance:
- a. Report Assured - The report shows good understanding of, and is consistent with, the Social Value process and principles.
  - b. Report Assured with attached limitation statement: 'Limitation of the application of Principle 4: Only include what is material' - The report shows understanding of, and is largely consistent with, the Social Value process and principles with some limitations.
  - c. Report does not meet the assurance standard criteria, but can with changes possible within an amendment period – The report shows a reasonable understanding of the Social Value process and principles but requires amendments to meet the assurance standard criteria.
  - d. Report does not meet the assurance standard criteria - The report does not demonstrate a sufficient understanding of, and consistency with, the Social Value process and principles. The report cannot be assured in its current form.

### *Amendment Period*

23. Amendment Period: Applicants whose report does not quite meet the assurance criteria may be granted a five-week amendment period following the initial assessment. Amendment periods are granted only at the discretion of the assessor and Assurance Manager whose decision will be final. The amendment period is subject to an additional fee of £300 + VAT.
24. If an applicant decides to accept the amendment period then they must confirm to Social Value UK and the assessor in writing within one week of receiving the opportunity. Social Value UK will then confirm the dates of the amendment period with a new final deadline.
25. During the amendment period the applicant can resubmit their report only once for re-assessment.
26. Payment of the amendment period fee must be made before we release the results. Any late submissions incur an extra £100 admin fee.
27. If a report has failed to meet the assurance criteria it is possible for the author to re-apply using the same report. However, this will be rejected if the applicant received more than the standard feedback (which is one written recommendation form and a one hour Skype feedback session with the assessor) during the first application. The final decision on this will be made by the Assurance Manager in collaboration with the

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original assessor.

*Additional terms and conditions*

28. Association of an individual with Social Value International, or any Joint Member Network does not imply any professional standard.
29. Social Value UK and Social Value International will not be responsible for any claims made about the quality of a report, or about the professional standing of any person associated with a report, other than the assurance statement.
30. Social Value UK will not be responsible for any actions that an organisation takes based upon a report that has been submitted for assurance or accreditation.
31. An assured report does not grant any level of SVI Practitioner status to the author/authors of the report unless it is part of a full application for SVI Level 2 or Level 3 Practitioner status.
32. Applicants agree that the only assurance statement that may be attached to a report is the wording provided by Social Value UK.
33. Social Value UK will not accept responsibility for any applicant's commercial interests that result either from a delay in application, delay in the assessment process or decisions that do not lead to report assurance.
34. Social Value UK cannot take any responsibility for undertakings given by applicants to their clients on matters relating to the timing of the assessment or the timing of the assurance process.

I declare that I have read, understood, and agree to the above terms & conditions:

Signed: \_\_\_\_\_ Date: \_\_\_\_\_