

Social Value Manager

whatimpact white paper 2023

whatimpact

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Greetings from the CEO

Social value as an umbrella concept for social, environmental, and economic value is currently one of the biggest forces changing the private sector. The fast-escalating climate crisis, as well as a wide range of poverty and inequality related challenges are touching us all on a global and national level. In the quest to tackle these challenges, the public sector has put in place voluntary and mandatory policies to change the course of our future through both legislation and their purchasing power. Other private sector stakeholders, like investors, consumers, employees, and governing industry bodies are also demanding more sustainable business practices and transparency around them. These requirements both force and allow companies to play a key role in harnessing economic, human, and knowledge resources to change the course of sustainability challenges in our society.

This positive change has created a need for new kinds of knowledge and skills in companies to be able to innovatively create new strategies and to embed social value requirements at the centre of business operations. Although corporate philanthropy and social responsibility, per se, are not new concepts, suddenly, just over the last decade – or more specifically the last couple of years- companies have been faced with much more structured and diligent sustainability and social value requirements. The emergence of these practices has brought with it a requirement to nominate new job roles and invest in social value and sustainability talents.

We at whatimpact.com are privileged to operate at the core of social impact. We work closely with a vast range of private sector companies, who have essentially helped us build this concept (formulated around their needs), which they can now take advantage of. Each week we meet with tens of dedicated social value professionals and have learned what their desires, pain points and wins look like. What has really struck us when working with these dedicated people, with a real passion for societal change, is their ability to cope with a very vast, yet undefined, job role with so much to learn every day. As social value is still a relatively 'new topic', it requires an extremely proactive mentality from these professionals due to the fast-evolving nature of the social value world. This applies across various aspects: measuring, reporting, technology, frameworks, legislation and policies, accreditations, certifications – and of course methods to create the change. Yet, unfortunately it seems that they are still often considered to be doing 'the fluffy stuff', as only rarely do they have enough mandate or a budget to do their jobs properly. All of us working in the 'social value' industry at large know that this must change.

Therefore, we truly hope that this White Paper contributes to raising awareness in company boardrooms and at the executive level of the importance of social value in the future of any business. Whether companies commit to measure, deliver and report on social value for ESG, public procurement, new EU wide CSR directive purposes and/or for stating their relevance to their stakeholders as a brand and employer, social value is the key commercial success factor of any company.

We also hope that the public sector, which demands governance and procurement related social value from their contractors, gets ideas on how to improve collaboration with social value professionals and companies. To the third sector, we wish to flag out the huge company-charity/social enterprise collaboration potential that the rise of social value presents. And last, but not least, we call for association, umbrella bodies, and educational organisations to collaborate on defining the knowledge and skill requirements. Further, to create pathways for official education and certifications that are up to date with the everyday requirements social value professionals are facing.

This White Paper has been co-created, with over 150 organisations and individuals partaking in our research and giving us insights. We wish that you may truly 'hear' the voice of social value professionals when reading it. We also truly hope this encourages all social value professionals out there to continue their pioneering in the field and know that they are not alone with their challenges or their desires. Our mission is to continue to be a part of this exciting social value community and leave our legacy through enhancing cross-sector collaboration and building digital tools to increase the efficiency of social value delivery for a bigger impact on our society.

We warmly thank our long-term partners and supporters who have been part of our journey to make this White Paper happen.



Tiia Sammallahti



[Read more on our blog:](#)

[Risks to mitigate social value](#)



Sponsor foreword

HACT has pioneered the use of social value across and beyond the social housing sector since we first began creating the UK Social Value Bank in 2012. Over the past three years, we collaborated with over 50 organisations, including investment firms, architects, lawyers, assurance companies, environmental consultants, procurement organisations and housing associations to develop and begin implementing the social value roadmap. This groundbreaking initiative is now in its final phase where, amongst other issues, we are focusing on the professionalisation of the social value sector.

As the sector has matured, the number of social value professionals has increased: from those working on tender documents, to those directing strategy. With this growth in the number of professionals, the need for professional standards and development has grown. We need to ensure that the way social value is calculated; the way it is used across different sectors and the way it is promoted, reflect the critical role it plays in ensuring organisations deliver impact for

individuals and the communities in which they live. This White Paper is a welcome step on the journey towards professionalism which HACT is proud to support.

Michael McLoughlin
Head of Social Value
HACT



Executive Summary

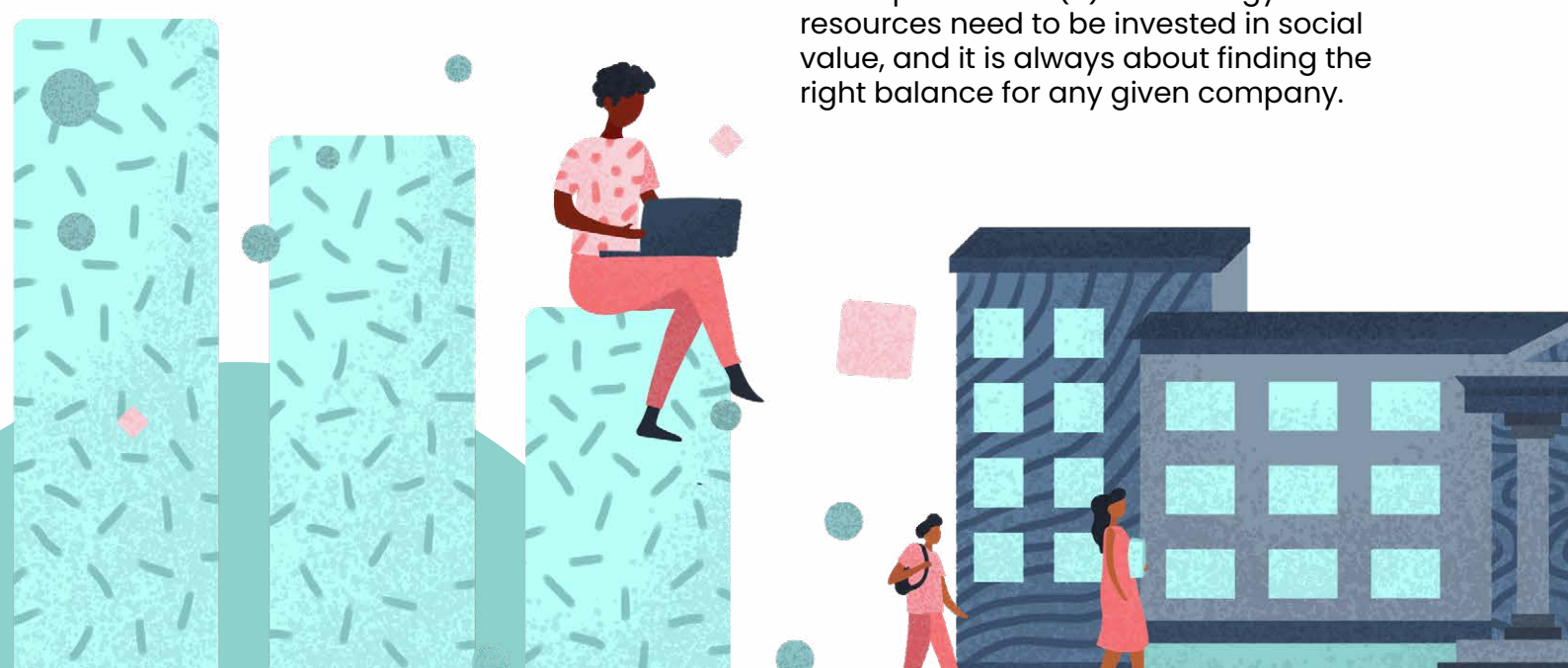
As social value continues to gain importance in the business world and the industry and as job roles and practices start to take shape, we at whatimpact thought it was exactly now that the voice of social value professionals needs to be heard. So, in this research project, we set out to explore, establish, and embrace the job role of social value professionals and how businesses and the industry as a whole can support them to succeed – providing the biggest impact to society and best benefits for their companies. Our study combined quantitative and qualitative methods and involved over 150 professionals and experts in the field – allowing us to draw key conclusions for social value professionals, business boards, and the social value industry.

First things first, the motivation for companies to hire social value professionals is threefold: from being a part of the company ethos, to CSR and ESG requirements, and lastly for procurement & commercial reasons. There has been a notable increase in the focus on commercial value of social value – which makes the success of these professionals ever more important at all levels of business.

There is extreme diversity amongst social value professionals, ranging from their educational background to their daily tasks, main responsibilities, management structures and hierarchies, all the way down to their job titles. This great variety demonstrates the unique position social value professionals occupy at the moment as they rapidly gain importance within businesses; yet still in some senses lack standardised structures and approaches. What is abundantly clear, and what unites this profession, is the motivation to be a force for good and the pride people take in their jobs in striving for meaningful impact.

From this state of flux arise many key challenges which are explored in detail in the paper. These obstacles look very different to different social value professionals: from difficulty influencing strategy, budget, and resource allocation or facing internal barriers to commitment to social value, to a lack of available tools, training, and education materials to assist in the planning, delivering, and reporting of social value. This paper sets out to capture these challenges and bring them to the attention of decision-makers and the industry as a whole.

Our key findings summarise some of the important upcoming steps needed to support social value professionals and the work they do. (1) It is more important than ever to allocate the proper respect and recognition for these professionals in order to enable them to continue their work. (2) Hand in hand, it is equally important for boardrooms to allow them the space and influence over strategy and budgets. (3) Instability in the social value market is keeping everyone on their toes, making flexibility a key requirement in this profession. (4) Technology and resources need to be invested in social value, and it is always about finding the right balance for any given company.



Setting the scene

Globally, ESG, sustainable procurement, and strategic CSR are growing trends across industries and sectors, making the delivery of social value incredibly important. In recent years, the importance of social value has been enhanced with various policies & procurement related mandatory and voluntary requirements, making it a topic that cannot be avoided in any business operations. This fast growing and wide-reaching influence of social value has created its own 'social value industry' which now sits at a kind of crossroads.

Social value sits at a similar position as HR did decades ago, back then it was considered the 'fluffy stuff', yet now we have grown to know the integral role HR professionals play in talent management, diversity & inclusion practices as well as employee engagement & retention. This is what is happening to social value at an escalating speed and those companies who don't understand its importance and invest in it, will fall behind.

Anna Kotsalo Mustonen
whatimpact.com
Board Member &
Impact Investor



For central government Social Value is still relatively new, but it's already abundantly clear we need to invest in and develop the professionals who will deliver the outcomes and impacts we are aiming for. That's why I'm excited to see the sector turn the lens on itself, defining and agreeing the skills needed to underpin effective delivery. Building skills is at the heart of the Social Value Model, in three of the five Themes, it's vital work! I'm looking forward to [the event], feeling the passion and helping to push Social Value forward.

Peter Coy
Social Value
Implementation
Lead, Ministry
of Defence, UK
Government



A key feature of the concept is that it can be hard to define, but people tend to grasp what it's about when they see examples in practice. That makes the job of a government procurement manager challenging, since they need to weigh the benefits of various tenders, which may offer very different proposals to generate social value.

'Here to stay' – the rising prominence of social value in public procurement
Civil Service World, June 2023



Read more about the
UK Government's PPN 06/20

Read more about the
EU wide directive

*The listed sustainable procurement regulations are presented as examples and they do not include any direct environmental policies.

Sustainable Products and Services procurement rule (Upcoming)

PPN 01/21 – Scoring Social Value (Northern Ireland)

Procurement Reform (Scotland) Act 2014

The Wales Procurement Policy Statement 2021

Wellbeing of Future Generations Act (Wales) 2015

Social Value Act (England & Wales) 2012

Procurement Bill

Procurement Policy Note PPN 06/20 (including Social Value Model)

The EU Public Procurement Directive (2014/24/EU)

The Corporate Sustainability Reporting Directive (CSRD)

The Public Procurement Act 2012

Action Plan for Responsible and Sustainable Procurement (RSP)

Municipality related sustainable public procurement (SPP) practices

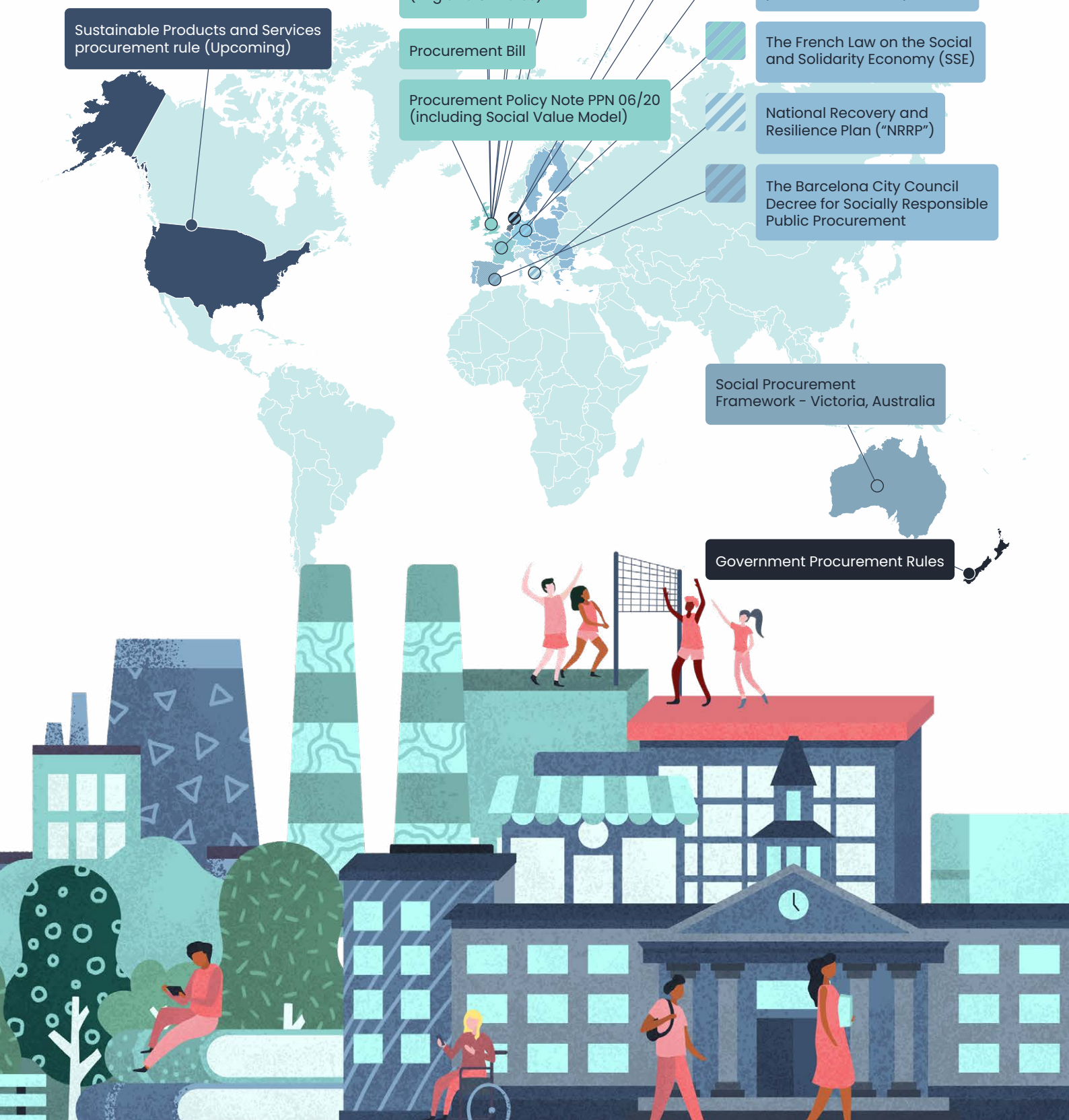
The French Law on the Social and Solidarity Economy (SSE)

National Recovery and Resilience Plan ("NRRP")

The Barcelona City Council Decree for Socially Responsible Public Procurement

Social Procurement Framework – Victoria, Australia

Government Procurement Rules



Research initiative and methodology

This White Paper is an initiative to explore, establish, and embrace the emerging job role of social value managers and similar roles at the heart of impact creation and social value delivery of organisations. The project consists of a combination of qualitative and quantitative primary research amongst existing social value professionals, including titles ranging from social value managers, leads, sustainability professionals, and ESG / CSR managers just to name a few! In addition to the quantitative survey, the research included in-depth interviews with the job roles at hand, supported with interviews with human resources professionals, researchers, and topic related government and association bodies.

Social value professionals are working in various sectors and organisations, but the main focus of this White Paper is the job roles in private sector companies ranging from small SMEs to the largest national and international corporates, where social value has become an important aspect of commercial viability, due to voluntary and mandatory requirements and regulations.

The main purpose of this study is to establish an understanding of where sustainability and social value related management level job roles are in a continuously evolving field. We therefore focused on the reality and perception of the people currently working in these positions. Ultimately, we hope to give social value professionals in the private sector a voice in order to help shape these roles in the future and discover how they can achieve success in their careers.

Research Summary:



114

survey respondents



36

deep dive interviews -
Social value professionals



6

subject matter expert interviews



Secondary sources

Consult the reference list for further reading!



Why do companies invest in social value and in managers managing it?

To better understand what social value managers do in their respective companies, we first sought to understand why the companies they work for invest in social value. From our survey the majority, (68% of respondents), said the motivation to deliver social value is done for both company ethos and more commercial reasons such as procurement and/or CSR/ESG. 14% of companies considered the reason to be purely the company ethos; 7% focusing on corporate responsibility and ESG. 11% of respondents stated their social value commitments to be purely related to mandatory procurement requirements.

Back in the day, the motivation of responsible business stemmed from good-will and so called 'giving back'; it then developed into more strategic stakeholder engagement and sustainable business approach. However, the recent surge in interest in social value in the private sector is largely due to the increase in its appearance in procurement. This is reflected by 77% of responses saying their motivation or experience is driven partly or fully by procurement related social value.

"It is recognised that if we don't do well within social value tenders we don't grow business."

Regardless of these 'business' reasons leading the course of social value, the interviewees in deep dive conversations wanted to highlight the ethical intention of their companies, and also their own personal aspiration to contribute to society.

"My role is not related to commercial success at all", stated one interviewee."

Another interviewee acknowledged a more risk mitigating view on their job:

"My job is to know and monitor our impact and try to minimise risks and negative impact and maximise positive impact. So, for that I have to know what's happening in the business on the ground."

Some were more direct and comfortable for their role as business development resource:

"My main job is to win work for the pipeline".

This diversity in motivation demonstrates the inherent cross-industry nature of social value and how social value as a business function is interconnected with many other overlapping business functions, and therefore motivations.

Social value professionals - range of job titles

When commencing this research, we were expecting that the range of job titles was bound to be vast due to the versatility in the job roles as well as the diversity in the size and industry of companies taking part in the research. However 50 different job titles for 150 participants was still a surprise!

The motivations for companies to focus on social value in procurement and CSR/ ESG purposes are reflected in the title. Some research participants did not have a directly 'social value related' job title, but they wanted to partake in the survey as social value has evolved to be the main focus area in their current role.



Development manager

Charity manager

Head of Social Value & Customer Services

Social Value Lead

Senior community business partner

ESG partner

Social Value Project Officer

Commercial Director

Director of ESG

Head, Social Value Delivery

Head of Social Value and Social Return of Investment

Community business partner

Junior Policy Manager - Social Impact

Head of Project Social Sustainability

Sustainability and ESG manager

Social Value Senior Officer

Procurement Policy Manager

Community Liaison Officer

Social Value Manager

CSR manager

Social Innovation and Sustainability Manager

Business Operations Executive

Head of social value and social return of investment

Sustainability Advisor

Social Value and Sustainability Lead

Place Social Value Lead

PR and CSR manager

SROI Consultant

Social Value Advisor

Bids and Social Value Manager

Director finance sustainability manager

Social Value Consultant

Project Analyst

Head of Sustainability

Strategic Social Value Lead

Head of Social Impact

Social Value Officer



Who are social value professionals & what do they do?

Educational background

To better understand where social value professionals come from we posed the question of their level of education attainment. From the survey, we found that 85% of survey respondents have a university degree, with three even having a PhD level qualification.

Most of the degrees did not have any direct correlation to social value or sustainability, and there seems to be no common degree amongst these professionals. However, it is not surprising that these positions, with their various challenging tasks and where transferable academic skills are often needed, are filled with talents who have university level qualifications.

What is included in a social value professionals' workload?

In the survey we asked social value managers what takes up most of their time in their job and requested they choose three options. The most popular, at 74%, was strategising and planning social value; 35% being on using calculation & analytical tools; 44% on innovating and creating new environmental and social programs. 26% of respondents attributed finding VCSE partners & coordinating projects as their top jobs.

The interviews gave more in-depth information on what kind of tasks they were responsible for or involved with. These varied from planning and supporting bids for tenders, to seeking locally relevant partners for donations and volunteering; from internal management of resources to managing accreditation and certification processes. Weekly tasks of these professionals might also consist of science-based data analysis on local areas of deprivation for contract work, reporting with various digital tools and against very different frameworks.

"I am responsible for supporting new bids, helping with making sure commitments are delivered. I support all our employment efforts too, to generate more social value."

"My day to day manifests itself in managing a team that are out there delivering the social value that we've committed to through tender processes, but also making sure that those commitments are still relevant and still useful and impacting communities in the right way, as well as aligned to our larger strategy."

What is your level of educational attainment

Secondary school up to 16 years (3,16%)

Sixth Form (A-levels, BTEC, etc.) (7,37%)

Vocational education (2,11%)

Undergraduate degree (44,21%)

Post-graduate degree (41,05%)

Doctoral degree (2,11%)



Social Value shouldn't sit separately. It should sit in the responsible business strategy. That's what we are doing at the moment in Capita, because it is really, really important to have that vision and strategic approach to be able to build the local solutions for particular areas.

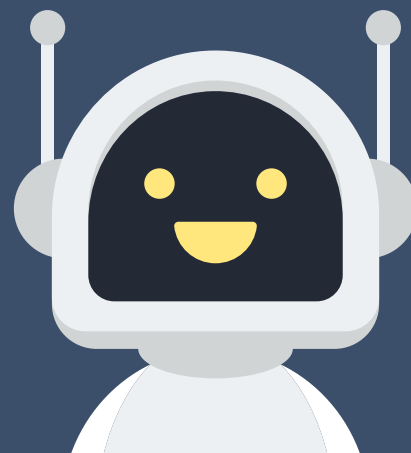
Kasia Gulyk Rutkowska
Group Head of
Responsible Business
Strategy, Capita



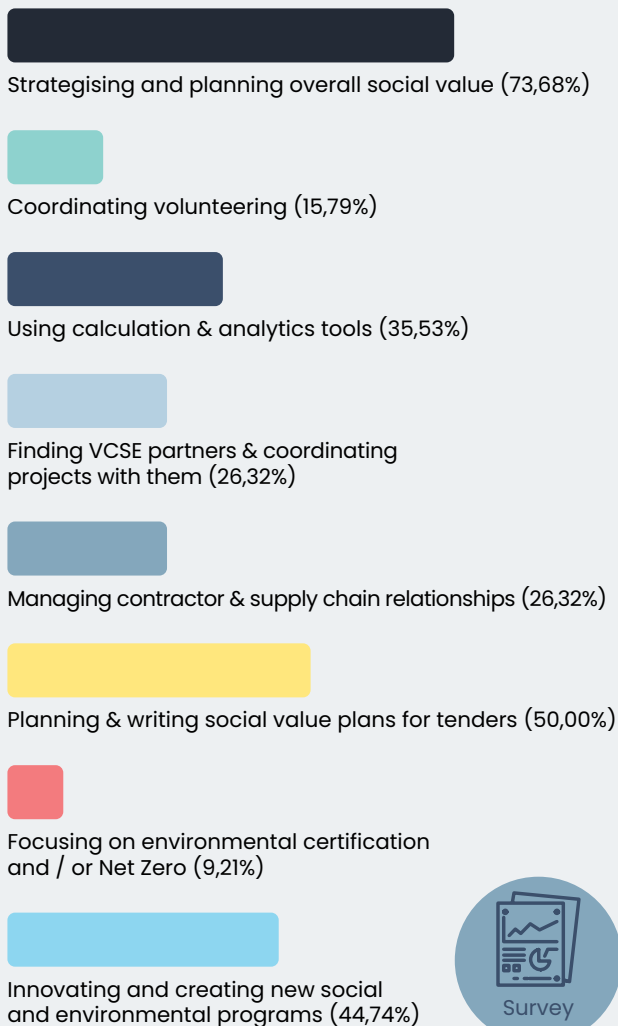
Even ChatGPT recognises that the social value manager job as a new and unestablished job role with various tasks involved:

“Social Value Manager” is not a commonly recognized job title, so it may vary depending on the organisation and industry context. However, based on the term itself, a Social Value Manager is likely responsible for managing and promoting social value within an organisation or community. Here are some possible responsibilities and functions that a Social Value Manager may undertake:

1. Social Impact Assessment
2. Developing Social Value Strategies
3. Stakeholder Engagement
4. Reporting and Metrics
5. Collaboration and Partnership
6. Policy and Compliance
7. Internal Advocacy and Training



What takes most of your time in your role. Choose 3 options.





In the interviews it became clear that due to the large variety of tasks and the continuously changing nature of the job description – flexibility is a must. This, topped with a hands-on-attitude and passion to make a difference, makes the perfect candidate.

“I’m responsible for the strategy, I wrote it from scratch myself and then I’m, at the moment, launching it and implementing it.”

While there is merit to the flexibility of the role, the other side of the coin is the exhaustion of dealing with too many responsibilities to comfortably tackle on a day-to-day basis. We interpreted this to be the reason why some of our interviewees were, to a certain extent, indignant of their daily

responsibilities. The constantly evolving job roles were described as both exciting and challenging, as with any other job, but especially with these social value roles whose bounds are still largely undefined.

“Social value managers tend to be the people within an organisation who coordinate everything that other people say they’re going to do. They manage it and they deliver it.”

“My job title is Social Value Lead, but as you can imagine, it’s not really telling exactly what I do.”



One interviewee states the variety of responsibilities they have for each day:

"I kind of do a bit of everything in a sense as well. I offer a lot of business support to the various areas of the business. Looking after processes and policies that we've got in place, managing sort of the HR function, assisting with training within the business, to external suppliers as well. I also drive ESG within the business and manage the social value side of it, and then also getting involved with sort of social media and marketing. So it's quite a vast role. In terms of social value, to be very honest with you, it's very daunting."

Working in the international landscape extends the scope of work. It means making sure both social value strategy and action comply not only with the UK requirements, but also with EU and global standards in reporting and setting up projects to help the organisations to reach their ESG targets.

"I've spent the last five or six months ensuring that from a governance perspective and in that ESG role, that we have all the sort of HR systems, the IT systems, all setup policies in place to match the global standards we have to meet."

Another candidate is looking to *"achieve that ESG and social value is so well embedded into the business that people talk about it just as much as they're talking about the production side and the building side."*

Another one accounts that they do *"resource management and working with the teams and bringing colleagues on the journey with us as well. It is giving them the tools, the knowledge and the confidence to go out and deliver social value into the community."*

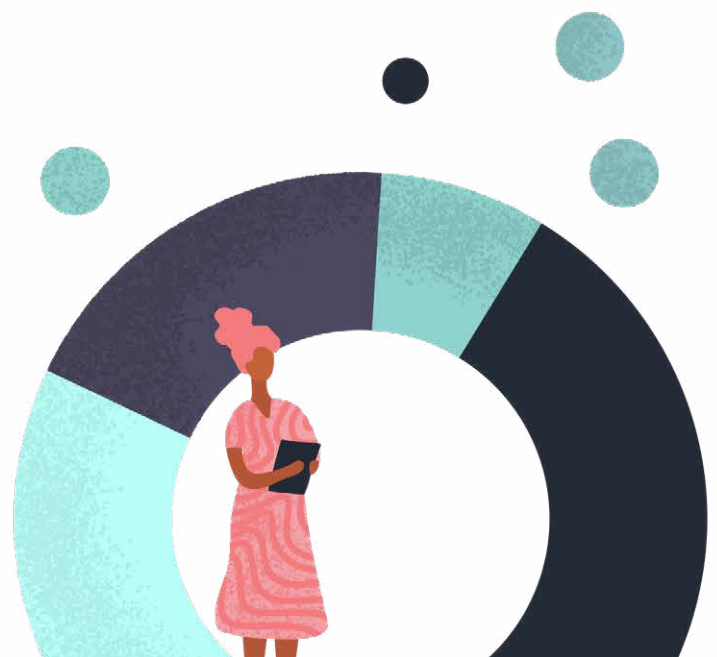
Some hold a position as the subject matter expert and help the rest of the organisation choose the 'right thing to do': *"trying to ensure we're just doing something that will actually do good, because you can end up doing a lot of stuff that's just a bit like, okay."*

"Making sure our social value initiatives are meaningful - not just bake sales and bike rides!"

This subject matter expertise status is extending social value managers' role to be an educator in both the supply chain and the community. They also seem to deliver social value by being the company advocate for the matter and spreading knowledge of the concept: *"It is about talking to people just when I explain what it is that we're trying to do, just sort of seeing the lights switch on in people's minds and they go, that sounds brilliant!"*

"Big part of my job is kind of upskilling community partners to understand the concept of social value. They deliver really great things with a purpose, but they don't necessarily associate it with the social value nor measure or report on the same metrics that we do in the private sector with frameworks and calculations."

It was extremely insightful to gain an understanding of the challenging and diverse nature of the work social value professionals are taking on in different industries. We have uncovered that the current reality of this position is one without a clear definition of responsibilities or how they are placed within the company.



Being proud of their work

Survey respondents were asked what makes them proudest of their job. 63% were most proud of knowing their work is purposeful and that they are making a difference. 13% of the respondents also appreciated the diversity of the job role; a similar number appreciated that social value enhances the commercial success of their business.

“Helping the business to become a force for good (and still profitable!) is a journey that comes with challenges but is hugely rewarding.”

Generally, it is *“just exciting how the whole thing’s evolving really. It’s become a thing now, it’s an industry within an industry almost.”*

“I love my role, something different everyday and I am passionate about making an impact both internally and in our local community!”

“Just keep doing what you’re doing, don’t be demoralised when some don’t emphasise it as much as you do. Perseverance is key. Be proud!”

Social value has changed so much because businesses have accepted it. Young professionals have a big stake in this shift as well. They are given more opportunities for social value and therefore have driven the movement a lot.

What makes you proudest and happiest with your job



Diverse job role (11,84%)



Purposeful work, making a difference (63,16%)



Managing social value related partnerships is rewarding (5,26%)



Enhancing commercial success of our business through social value (14,47%)



Learning new things and being able to educate myself (5,26%)



Olivia Sutcliffe
Responsible Procurement
Manager, Greater
Authority London



Ultimate goal in the role, how do the social value professionals see it?

When asked what the ultimate goal is for our interviewees in their jobs, the answers varied and interconnected in many ways. As researchers, we sometimes noticed hints of resignation in people's answers. We realised that the desire to do good, pitted against the need to bring in profit for the company, is frustrating for some.

All social value managers believe that social value is something that companies must do rather than something that is nice to do. It is a requirement, not a novelty. Interviewees called for stakeholders to recognise social value not only as a necessary natural part of the company's ethos and a daily occurrence but also as a movement, one that needs proper definition and organisation.

Interviewees and survey respondents alike wished for social value to gain more prominence in the market and for everyone to have a better understanding of social value. The lack of a proper definition for social value opens the space for varied interpretations, some conflicting or adding on to one another. While some interviewees had personal views on how social value should not be tied to the commercial success, they understood the commercial motivation of the company but distanced themselves from the scenario by saying: *"It's like social value shouldn't be for economic profit. Obviously I was hired because that was a need because of profit, but my role is not a profit making role. I'm not. I'm an overhead in the company."*

It is clear that juggling the interests and motivations of many actors is an arduous task.





I have spent the last 8 years as a social value researcher, tracking the development of practices and talking to experts in the field. This has put me in a privileged position of being able to stand back often and see the field as a whole as well as the time to dive into the details when I need to understand it more. We are now reaching an exciting point in the social value field maturing and us professionals being able to better define our roles within it. After a decade of tussling over processes, methods, and definitions, most of us now sit comfortably with the fact this is a complex field which we don't want to simplify too much. So, in my view, what comes next is a carving up of the field. In the same way that someone who tells you they work in sustainability could mean a whole range of roles, skills, and project types, I think social value is heading the same way.

We may be working on setting strategic objectives or doing detailed monitoring and evaluation. We could be working across varied parts of an organisation or project lifecycle, as either the core part of our job or a side line. But as we are embracing the growing energy of people working on social value, that gives us the freedom to not have to try and do it all. Instead let's stay as a community who have social value as the ultimate outcome of their work whilst forming professional sub-groups that allow us to be more specific in what we can do and offer.

Cara Mulholland
Researcher,
University of
Reading UK



Satisfaction for social value professionals

Inner satisfaction

'Purpose' is referenced a lot in this white paper, because social value professionals have a passion for what they do, and they talk about it a lot. Sometimes it is bureaucracy or other agents' motivations that are contradicting the purpose and change they drive in communities.

"Trying to make a difference."

"Delivering purpose over profit."

"Being able to see change happen."

It is also true that the diversity of the job role is satisfying: the flexibility, the adaptability, the ability to innovate and witness the positive outcomes you are pursuing and implementing, are undoubtedly satisfying and meaningful.

"Oh, I love my job. I'm probably one of the luckiest people in terms of, it's such a rewarding role!"

A key commonality we found amongst the interviewees is that one of the key sources of satisfaction is knowing the impact you can have on the communities you work with. Social value managers, we found, are most satisfied with themselves and their work when benefits and opportunities are brought to the community.

"When we employ people, local people, or we use local business, or when we volunteer on local project and have that sort of human impact, just making making that happen makes me happy."

"Seeing a young person come through from apprenticeship and see them shine. Bumping into them a couple of years later and see that they are doing well and moving up."

"Working with positive people who achieve great outcomes."

"Knowing and seeing you have made an impact is very rewarding."

Aside from being motivated by 'helper's high' and witnessing the grass root impact, social value managers' role in creating new business is growing in importance as all government related contracts now tend to have social value questions, which are getting more and more competitive.

Therefore, we also found that satisfaction came with pleasing a client and winning tenders, which sometimes would entail progressing up the corporate ladder. Receiving recognition for a job well done and being compensated for it is also something that we found from the interviews, as some satisfactions took a more personal note in their contribution to the company.

"When I am putting together a bid I kind of worry a bit that it might go down to the wire, so I feel a little bit anxious sometimes. But on the contrary, I get personal satisfaction from seeing when we get a high score on social value."

Perhaps social value managers have higher emotional stakes in the future of social value as a whole because they are the first to witness when positive change is taking place. On the other hand, they are also first to detect when the impact is lacking or lagging behind - or is being interfered with by the powers outside their influence.

"I Love it. I love being passionate about social value, loved how I have moved up the corporate ladder in a company that touches and influences people and communities it's fantastic."

Salary satisfaction

The focus in discussing salary was to get a perception of social value professionals' satisfaction for their compensation, rather than delving into the salary levels amongst these positions. 70% felt that their current compensation was adequate, which left 30% feeling not appreciated salary wise. With the varied job roles, sizes of the organisations, and industries involved in the interviews, it is likely that the salary range is quite wide. As the roles in social value are evolving fast, and might not even be defined by the companies recruiting new talent, challenges in the job market occur:

"Have noticed huge variations in salaries and job descriptions for social value roles, which can be hard to know what to apply for or baseline, especially if salary isn't advertised. I think lots of people have many of the same issues with establishing and delivering social value and we need to get better at information sharing."





Social value professionals' position in their organisations

The undefined nature of the role of social value professionals also means that the way in which they relate to others in the business and interact with different business functions and decisions varies and is constantly changing.

Social value professionals carry a role that is inherently collaborative in its nature, as we established in outlining the responsibilities required, and thus good connectivity and communication within the business is crucial.

"You can't do things in isolation, so you're constantly liaising across different departments and different projects and different sectors of the business."

Sometimes the commercial side and the social value side coincide, but it gets frustrating when they clash, and social value strategies are inevitably deprioritised from the agenda. Social value professionals feel strongly that they should not be sidelined as they deserve the recognition, resources, and importance of their fellow business functions. One social value manager stated, *"it's not always supposed to be social value that gets dropped down the priority list."*

Social value professionals told us they work well with many departments, from business development to marketing to HR and many more. However, it is still important to maintain a focus on the social value roles as a separate function. As one interviewee explained well: *"I want businesses to stop blurring lines between social impact with business development/advertising. Whilst it clearly achieves this, to be genuine, social impact should not sit inside comms, marketing or business development departments. Nor should they have dual function within the role. Social Impact should sit outside all business development and promotional activities. This is hugely frustrating to see roles advertised asking for these skills and tasks."*

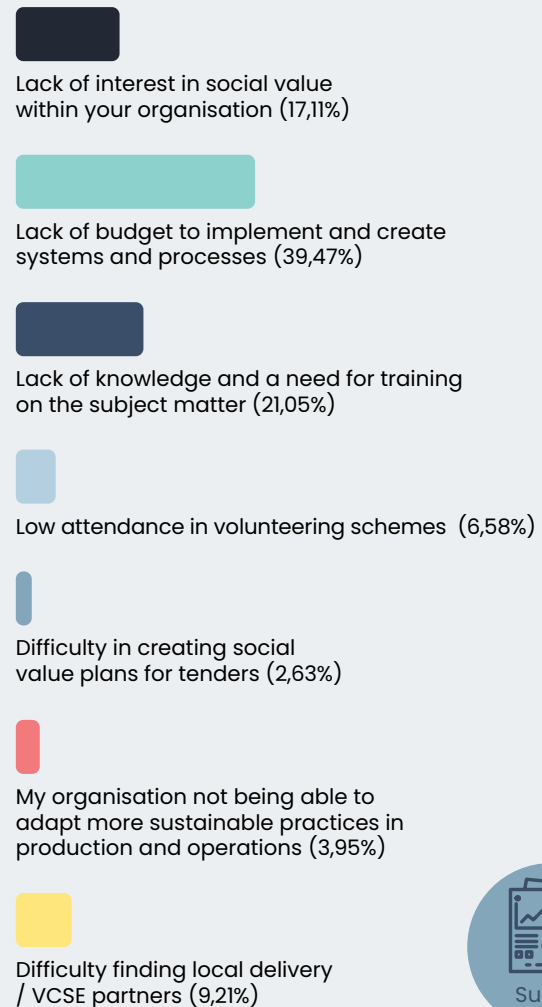
Challenges of social value professionals

The main challenges of this professional field quickly became quite clear to us. From the survey we found that 40% of respondents found the lack of a budget to implement and create systems and processes was the most challenging part of their job. This is important to investigate in relation to the question of strategy, which we will explore below, and has a substantial effect on the rest of the work of social value professionals.

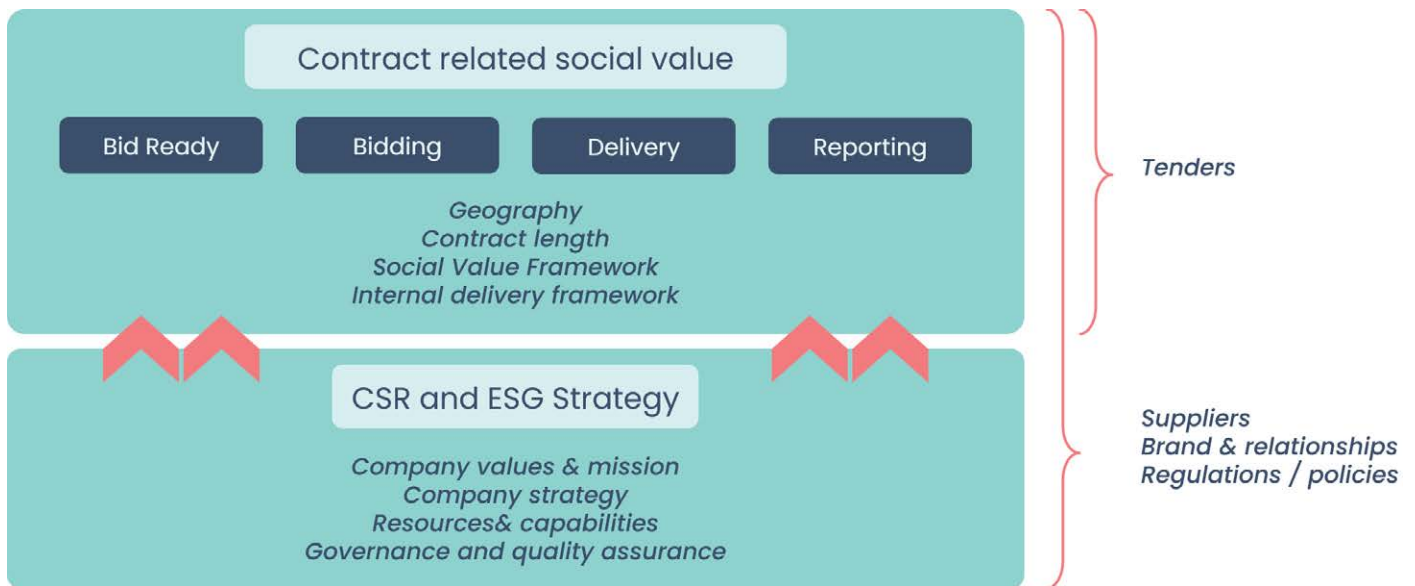
21% of respondents said that it was a lack of knowledge and a need for training on the subject matter. 17% mentioned lack of interest in social value within their organisations being a problem. These findings were echoed by the interviews, and we will explore them in the following chapters.

The lack of proper definitions, standardised methods, and clear standards were repeatedly mentioned in the interviews. These failings were said to lead to a difficulty of distinguishing between good and great work, and clients and suppliers not understanding social value. This, again, can set high expectations for companies and social managers without understanding the reality or the resource requirements for implementation. As one of our interviewees stated, "no one knows what good and excellent looks like."

Biggest frustration in your job role



Strategy



Strategic Social Value Approach, copyright: whatimpact.com

Strategic approach for social value is important, otherwise the company operates on an ad hoc basis, and misses out both in impact and commercial benefits. Without a strategy there is a threat that social value becomes a 'clued on/add-on' functionality.

For social value professionals, there is a big divide between those who are independently in charge of strategy compared to those who largely have low influence over these decisions.

In some cases, social value managers are working very independently creating strategies and approaches they see fit: *"It will be down to myself and sort of other directors to make that judgement call and decision as to what direction we go down."* There are also shared responsibilities at the management level: *"I've been in charge of setting the strategy myself and with the other social value leads across the business."*

"I report directly to a director, who also sits on the board. So it is quite a direct route!"

Others, however, are faced with several organisational layers on top of them and strategies are given. This seems to hinder agile decision making in planning and implementations as the access to resources is difficult, due to lengthy and complex approval processes. What seems to also be a recurring issue in these cases is the degree to which the social value strategy is given importance in overall organisation. As one interviewee explained: *"I think having clear leadership support for the agenda is absolutely critical to the success of social value"*.

The social and community impact pillar exhibits the weakest scores, often because of deficiencies in planning. Comprehensive measures are needed to ensure infrastructure is more inclusive, collaborative and generates widely shared benefits. Less than a quarter of countries conduct strategic social assessments or require new projects to assess social impact, and in over 60% of countries engagement with local communities is ad hoc.

Infrastructure for Good – Building for a better world ECONOMIST IMPACT, 2023

It is clear that if senior staff are not taking your projects and strategies seriously, it hinders the implementation and success of projects and policies. If social value professionals are faced with an uphill battle (convincing the rest of the business hierarchy that social value is a worthwhile endeavour requiring attention and resources) it makes the rest of the job that much more challenging.

"It's quite hard sometimes to get the buy-in if people don't respect it. I guess my biggest qualm with it is that you constantly have to sell it and it's almost like people feel like they're doing you a favour."

The understanding of social value remains a big challenge on the board level, as one interviewee excellently said: *“Social value should be lifted above a project based approach and the boards should understand the connection between social value, ESG and overall sustainable business. They’re now all being thrown around the boardroom and they haven’t got a clue how they fit together, and we make their life more complicated than it needs to be, because they all fit together really clearly in my view.”*

“The social value roles in our organisation used to be very localised, so they were very contract specific roles at the beginning for our large clients (government). And the solutions for those contracts were developed in solo. That created some problems for the contract, as well as the central level. I think it’s important to have that overarching strategy and overarching processes making sure you’ve got that proper governance in place before you build local solutions.”



Responsible business agenda and social value should be fundamental to every modern business. Every organisation regardless of its size impacts society, including people and communities, as well as the planet we inhabit, in ways that go beyond the financials. Businesses who are serious about social value recognised their wider impacts, quantify how all aspects of the business work together for the greater good, and recognise that society should profit while business is being done.

Capita’s approach to the opportunities for action that the Social Value Act offers has been proactive and positive. The legislation is very welcome, but we still face challenges from an assessment and measurement perspectives. More guidance and consistency in this area would benefit both businesses and the customers.

Kasia Gulyk Rutkowska
*Group Head of Responsible
Business Strategy, Capita*

Even Chat GPT knows that company boards are increasingly interested in monitoring company performance in terms of social and environmental value.

Many companies now recognize that addressing social and environmental issues can contribute to long-term financial success and help manage risks. Boards have a role to play in setting the strategic direction of the company, overseeing management’s performance, and ensuring that social and environmental considerations are integrated into decision-making processes. This includes formulating policies, establishing goals and targets, and monitoring progress.



Budget & resources

The single biggest frustration that social value professionals face at the moment (as expressed by 40% of respondents) is the lack of resources and influence over budget, which is connected to the strategy point outlined above. 59% of survey respondents listed board support and having a budget as the most important thing that organisations could do to support social value managers doing their job.

When economic times are tight, social value is often at the top of the list of areas to tighten the budget. Although delivering social value does not necessarily mean direct money investments in activities, processes and overall resources of the company may need to be redirected to reach the targets.

“Social value is the current buzzword and expectations to deliver are high, however there is reluctance to commit time and resources to meaningful social value projects.”

“It’s easy to create social value when you have money to do it!”

As demonstrated here, the majority of respondents found this to be the key issue, which was also echoed in our interviews. We did not come across one organisation whose social value manager would have had their own budget to use without needing consent for resource allocation or buying products or services to manage social value. This is a clear sign of the still immature status of social value, although some might insist social value to be embedded into all the existing operational budgets. Without their own budget or decision-making power social value managers are struggling to deliver, as they can use only persuasion to get anything done, and are practically using budgets managed by other people.

“We do have a budget, and costs would go to the group and each of our individual projects, but projects don’t really have a social value budget. It gets kind of absorbed into project costs.”

Having no independent social value budget within a company leaves social value managers unable to do their jobs effectively. With social value being a relatively new business function, companies would need to restructure their budgets, and reorganise how they allocate their resources.

“I love my role, but doing it from within an organisation can be painful. I am stretching resources and hampering the capacity for meaningful impact.”

Some interviewees explained, for example, that they have no control over the volunteering budget/allocations as that sits entirely with HR. Many explained that it is difficult to get budget approvals for new projects, let alone tools and resources to help with the planning and management, leaving them quite stretched.

“1 day per employee. They do not harness their volunteering for procurements.”

“Each employee gets 15 hours volunteering. Volunteering is a HR initiative and not for procurement purposes.”

“All volunteering is approved by each individual line manager and then logged onto central system by the line manager”

Social value makes up a key component of how companies internally budget, which shapes how much impact they will have on wellbeing, same principles of SDGs. It has the same global significance.

Michael McLaughlin
Head of Social Value, HACT

The Social Value genie is out of the bottle – its best practice! Generating positive broader impacts through the choices we make in how procurements are delivered is a simple idea. Yes, the practice will evolve and mature over time, but it’s now how we are do business. In a world of wicked problems and interconnectedness considering Value for Money in its widest context and making decisions that support key societal outcomes is only going to grow in importance.

Peter Coy
Social Value Implementation
Lead, Ministry of Defence

Lack of internal commitment / interest

16% said the main challenge was the lack of interest in social value within their organisation, along with 7% stating that the commitment to fulfil the volunteering obligations was not great among employees. Additionally, 4% of companies could not deliver social value through their products or production.

One social value manager stated: *"I think the hardest thing on the delivery side of things is to get people to collaborate with you and getting the responses back that you need in the times that you need."* While another put it this way: *"A big thing always on my mind is the lack of respect social value has in certain projects. It's sort of seen as this kind of 'wishy-washy thing that we could do."*

"People do want to do the right thing. Our staff want to be engaged in this. They just don't always understand what they can do and how."

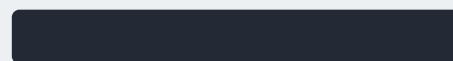
As some companies are committing to social value purely for contractual reasons, it might mean that part of the organisation has not even heard of social value and doesn't understand why they are requesting extra deliverables like reporting, or putting their volunteering efforts into certain causes.

"It's never plain sailing. Getting the team on board to deliver all the extra stuff is always a challenge. Because, they might be saying, I've got three weeks to finish this, and I'm over budget, I'm over time. And then I'm going, actually, I can see you've got five more things to hit in social value and we are committed to it by contract!"

Planning & bidding

Social value has become a crucial part of winning government work in the UK – placing a lot of responsibility on the shoulders of social value professionals. From our survey, 77% of respondents indicated their company bids for public tenders. Even though the motivations for social value are manyfold, as we have established, it is still true that a big part of these professionals' work is tied to the commercial success of the company and winning more business. The abundance of social value questions in tenders is also clear – with 43% of respondents reporting that they are always faced with a social value response in the bidding phase and 43% saying it is often. Only 4% said they rarely see them, which portrays that planning social value in the bidding phase is a key part of those social value professionals' jobs. There is a lot of responsibility tied to it, as the weighting of social value in bids is continuously increasing (currently 10–30% of scoring).

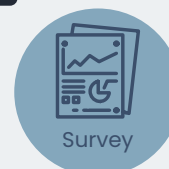
Does your company bid for public tenders



Yes (~75%)



No (~25%)



Survey

Are you bidding for central or local government tenders, or both



Central (~9%)



Local (~27%)

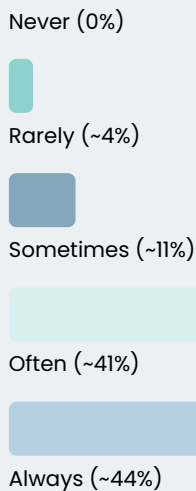


Both (~64%)



Survey

Are you getting social value questions in your tenders



Out of the 77% - the majority bid for both local and central government tenders, which presents its own unique challenges. The feedback from interviews was that a lot of questions centre on carbon reduction and environmental questions, which are often less about add-on activities of social value and more about integrated sustainability practices. Also, the high focus on getting monetary value points through apprenticeships is seen to sometimes lower the potential social value - as there would be much more impactful ways to approach local challenges.

Local government tenders are often seen as more advanced when it comes to social value targets, with a heavy priority on targeted, local impact, employment, and community engagement. Although central government tenders often have bigger budgets and more money, there is also a less specific social value criteria.

It was stated as a disappointment by many, that although social value might have been a bid question, historically you would know that there are no requests for reporting on the deliverables. This was found to be very un motivating and giving 'permission' for over-promising. Therefore, a stricter approach by the government is warmly welcomed, making the competition process fairer. *"Social value is so vital for future business, but we need better visibility at all project stages and not an add on approach. Government organisations need to be better at following through on tender commitments."*

"Most frustrating is not getting any feedback from government authority for the social value plan. So, if your bid has been unsuccessful and there is no feedback, it doesn't really tell you anything. Sometimes you'll think, why did I bother submitting? Were we ever really in the running? Or we were just kind of making up the numbers."

Social value managers are categorically committed to deliver what they bid for, and are proud of it: *"Tendering and bids are such a quickly evolving thing, that it's really hard to keep up with the standards and what they expect from us as well. Something that we've noticed recently, I guess in the last year is, how evidence-based it is now."*

Switching strategy and approaches between different types of tenders; modifying their approach from council to council; NHS to NHS, and ministry to ministry, presents a challenge. Social value professionals are having to go from thinking business wide and big picture to coordinating very specific projects and teams, often across the country, requiring a very flexible and versatile approach and strategies that recognise this.

"There's probably 10 plus bid writers in our team who are constantly kind of writing bids. I get involved on a daily basis. I'd have to sign off each bid, if there was a social value offer. Just to make sure, that you haven't got a bid writer throwing fancy numbers around, that isn't realistic."

"I see a lot of variation in the questions around social value in tender documents," says Sarah Hinchliffe, founder and chair of the Social Value Group for the UK chapter of the Association of Bid Proposal Management Professionals (APMP UK). "PPN 06/20 has definitely brought it to the forefront of procurers' minds and ensured social value is included in tenders. But there is a lack of consistency in the way questions are asked, or the space given to respond. Equally, there is often no clear sense that the expectation around social value is in proportion to the size of the contract, or of the supplier."

Civil Service World

'Here to stay' - the rising prominence of social value in public procurement, June 2023

Implementation & coordination



Social value in operations, copyright: whatimpact.com

Implementing and coordinating social value often takes up the bulk of social value professionals' workload. Here, relationships with the clients in terms of contract related social value deliverables (central or local authorities) impact the implementation of social value. In addition, there are expectations by other stakeholders, including investors, commercial clients, and employees, which need to be met. It was clearly stated in the interviews that a good team involved in social value communicates well; is organised and passionate about social value and is committed to the implementation of plans. Cross-department communication and commitment was seen as crucial.

Respondents outlined the need for the correct tools for implementation and coordination, in order to meet the requirements and standards. Leadership was stated to be vital; there were some frustrations about more senior level management not supporting social value projects. This impacted the success of getting the job done.

"There's a lot of coordination internally to work with teams and people to deliver the activities that we commit to."

"I think the hardest thing on the delivery side of things is to get people to collaborate with you and getting the responses back that you need in the times that you need."

An open mind was said to be the key to success both within the internal team of a company and on the client end (if projects are delivered as part of the contract work): the team must be able to adapt how a project is run. It was pointed out that many social value plans have been created a while back in the tendering process, and the situation or needs in the local level might have changed, or there might be a need to look for new delivery partners or methods.

There were other factors listed that create challenges for the social value delivery. In our survey we found that finding local charities, social enterprise partners, local initiatives, and coordinating projects takes up a lot of people's time, as in the case of managing supply chain relationships.

"It is satisfying for me to sort of get out there and have those conversations with the great and the good philanthropic agencies around the world to effectively put us front and centre, when we are in that position to donate a certain proportion of our supply and our production."

“So that leads me to my next point in terms of leveraging our leadership within our supply chain and with our wider partners and encouraging them to conduct social value activities, because it’s not just about giving back to the community, but it can be also mutually beneficial in terms of supporting their future talent pipeline and skills resources.”

“We often partner with local organisations and charities to deliver a lot of social value programs. But capturing all that data and interpreting it for the local authority, different stakeholders, and our investors is a key part of my role, taking up a lot of time.”

“Coordinated through my team - reported monthly internally. Externally requested by the clients. Measure & Report with TOMs.”

Establishing an investor’s track record on impact achieved demands ongoing measurement of impact on a consistent basis. The data investors collect (and publicly share) is not always consistent over time. So, even if individual impact measures are robust, the lack of consistency makes it difficult to track impact over the long term, or even to compare against the targets set out in an organisation’s strategy.

We owe it to the people and causes who are meant to be benefiting from impact investments, and to those paying for them, to make sure they actually do make social and environmental returns. Major impact investors should publish the data they have on the impact of their investments and commit to collecting it in a consistent way – especially longitudinal impact data. This would go a long way towards improving our understanding of what makes an impact, and ultimately help investors achieve more for the causes they care about.

Is good impact practice associated with strong impact performance?
NPC, June 2023

Measuring & reporting

For many social value professionals – reporting is a key area of their work: *“The area that I’m most interested in at the moment is around measuring social value and measuring that impact.”*

Reporting to multiple stakeholders using different social value frameworks, impact reporting methods, and differently set KPIs seems to be a big challenge, which needs alleviating in some way. When asked in the survey how they envision social value management to be improved in the future, a standardised social value framework was listed as the second most important wish. Standardised measurement and reporting method was listed as third – all of these coming after having board support and budget.

“There is a need for an agreed basic national framework from which to build a more relevant social value system – it does need to be refined and updated.”

The reporting landscape is exceedingly difficult for social value professionals, as frameworks and approaches to measurement differ vastly. ESG measurement tools and calculation methodologies are quite different from some procurement related proxy values. This leads to the fact that social value managers have to use different tools to report on the same things for different purposes – this does not only put a burden on the social value professional, but also increases costs: *“So from a reporting perspective, we could evidence that we delivered X number of initiatives and it returned this social return on investment figure Y, but another organisation could do exactly the same using a different tooling that comes out with a different figure. So just that set standard would be really helpful.”*

"It is a challenge as targets and KPIs are very different from project to project. So there's no consistent kind of suite of targets that we're trying to achieve, except for some that we have ourselves internally. So we have to produce different reports depending on different client expectations and different formats."

Even though we can all agree that it is hugely important to monitor the success of social value activities, extensive reporting and focus on monetised and proxy values cannot be all that social value professionals do: *"I think sometimes the quality can get lost in the reach for quantity in social value. People can then start getting into their realms. The market kind of drives the wrong behaviour so that there's a push for manipulating numbers and creating bigger outcomes rather than the focus on that individual journey. The impact of those smaller things can get lost along the way in terms of trying to create big, big achievements and big outcomes."*

This was also called for by an interviewee stating: *"Need to collectively shift the dial from monetary value created to the difference we are making, the legacy, the impact."*

"If social value reporting is really valuable, then the organisation should use it to improve the impact that they have on society and to understand how social value creation is made. Not just to tick the box of "aren't we great?"

"Yeah, a standardised approach for reporting would be nice. And also like this is not for the market, but I would love to not have proxies specified in bids, because I feel like councils specify what they want to see, but that's not actually what our impact is and we are going to have to deliver something that is not going to be impactful. It's not going to create change just to tick some boxes and to waste everyone's time and it's not creating change."

Also, a call for tangible impact was emphasised: *"The world of social value is a bit like the wild-west but developing rapidly. Not all measurements should be quantitative and I'd like to see a move away from this as a focus, to real life outcomes & impacts."*

In theory, when applying Social Value International's social value reporting

principles, both qualitative and quantitative measurements should be used instead of just giving an estimation of monetised value on social value efforts.

In our experience, while infrastructure companies are increasingly committed to the social value agenda, they often struggle when embedding action and then reporting on their deliverables. It's an issue which manifests itself when trying to understand and measure whether suppliers deliver the commitments they made during the tendering process.

Transforming the delivery and measurement of social value
New Civil Engineer, July 2023



Social value international – Principles of social value

The Principles of Social Value provide the basic building blocks for anyone who wants to make decisions that take this wider definition of value into account, in order to increase equality, improve wellbeing and increase environmental sustainability. They are generally accepted social accounting principles.

An account of social value is a story about the changes experienced by people. It includes qualitative, quantitative and comparative information, and also includes environmental changes in relation to how they affect people's lives.

1. **Involve Stakeholders:** important to involve everyone affected as it helps measure impact
2. **Understand What Changes:** evaluate how change is created, keeping in mind the intended and unintended consequences
3. **Value the Things that Matter:** be considerate of stakeholders' value
4. **Only Include What Is Material:** have boundaries of what is information and evidence
5. **Do not Over-claim:** only the activities you are responsible for
6. **Be Transparent:** show how data is accurate and honest
7. **Verify the Result:** make sure results align with decisions made
8. **Be Responsive:** respond in timely manner supported by accounting and reporting

Read more about **Principle of social value**

Download **Principles of social value**

In summary, there is a sense in our interviews and surveys that people are tired of a tick-box-approach to social value reporting and instead want to focus on frameworks that prioritise maximising impact on communities. The government and local authorities have increasingly started requesting evidence and qualitative data on the impact of social value contributions, which is welcomed. However, when it comes to government contracting, the added difficulty comes with the different approaches to social value reporting mentioned earlier.

The measurement and tracking of social value lacks common standards and approaches, while data is patchy and accountability is mixed.

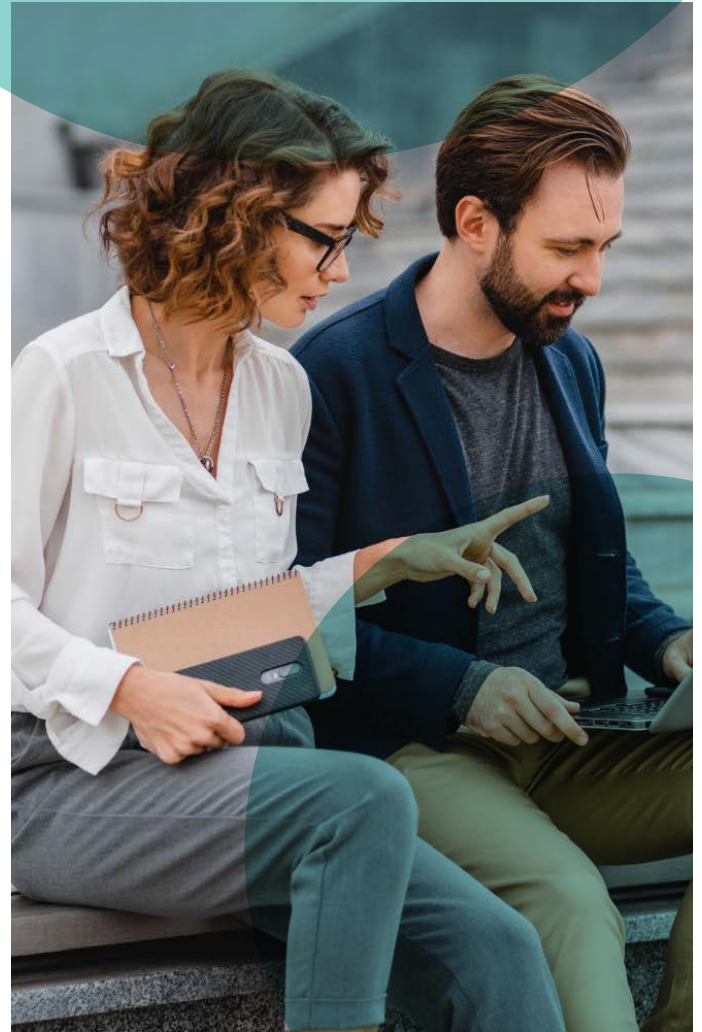
Social Enterprise UK
Social Value Roadmap 2032



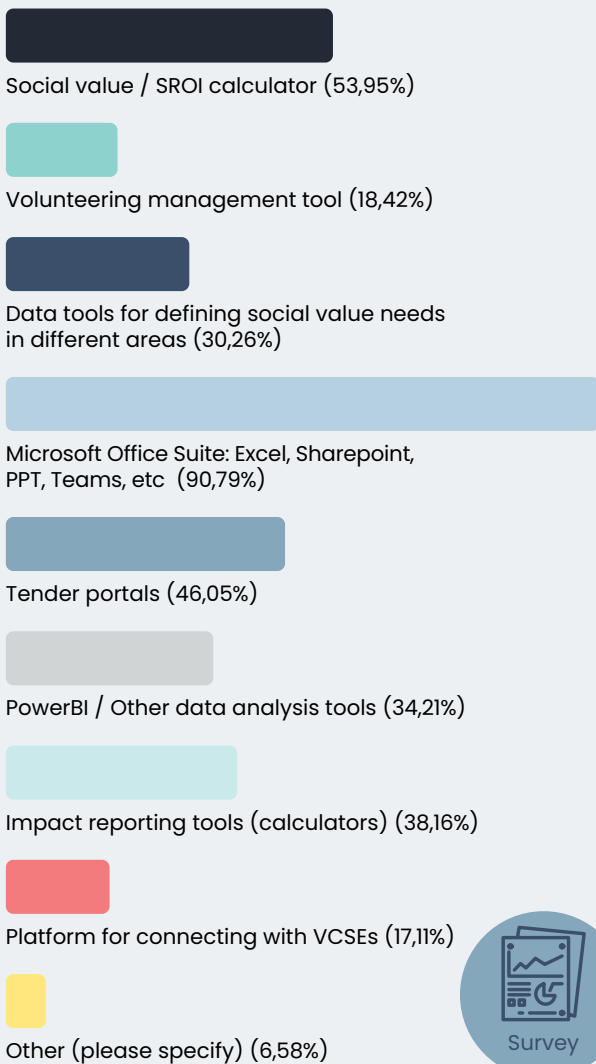
Tools

Social value professionals use various digital tools, the most prominent choice, after Microsoft Office Suite products, being social value/ESG/SROI calculator with almost 55% penetration. Tender portals were understandably popular, due to their mandatory nature of submission, but the popularity of data softwares was surprisingly over 30%.

"I think technology plays a big part in that (making social value manager's life easier). Technology is helping us have more of an impact, manage what we're doing, and also have more of an impact in the contracts that we are working on."



What tools do you use in your work



HACT social value insight

Social Value Insight is an innovative, online tool which uses the UK Social Value Bank to measure social value, making it easier to demonstrate the full impact you create. The bank consists of 88 outcomes, and it provides users with the support, advice and insights needed to easily calculate the social impact generated from your activities. Using person-centred principles to measure the impact on the wellbeing of individuals, the tool allows you to model, monitor and measure multiple projects, including procurement activities, from multiple sources across your organisation – all in one place.

[Read more about HACT](#)

Most experienced social value professionals have tools and systems in place for each step of the social value process. Although they are dedicated to contract specific social value, they find efficiency in well-planned intervention programmes, harnessing their resources in strategic ways and applying technology to each step of the process, as shown here: *"I probably do 300 – 400 social value bids in a year. But we've got a lot of systems, platforms and tools that have been set up over this long period of me doing it where we've got documents in place and everything's kind of ready to go. So it sounds like a lot, but it's not that bad."* In our interview question about how companies can make social value professionals jobs easier or more satisfying – a large section of respondents prioritised *"investing in digital tools for planning, coordinating, reporting on social value."*



"We use several suites of platforms: Social value calculators and inhouse tracker, which is linked to our CRM systems. Separate platform for volunteer opportunities."

The amount of tools available for social value professionals is overwhelming, to say the least, so the decision on what to use is important. The tools vary from Excel to Global ESG calculations, from employee engagement platforms to procurement softwares. Although technology is seen as a necessity and a big relief, there is a general sense of wishing for one centralised platform to manage all aspects of social value and to satisfy all stakeholders involved. However, it is also realised that the complex nature of social value - consisting of employment, environmental, supply chain, and community activities - makes 'one solution' to take care of all management aspects of social value (almost) impossible.

"Microsoft tools: excel mainly, also Social Value Portal for tenders, we're considering building our own model off of it."

"Requirement for national TOMs is not actually capturing the value they create; we use guidelines, SV matrix, NHS guidelines, creating our own impact reporting and use ESG platform."

"We use HACT as a starting point to look more and have discussions on how to drive and identify different options available."

"We use whatimpact's platform to identify local causes that we can support and utilise the partner generated impact reports for tracking our social value."

"We currently use two systems. An interactive app which allows employees to add additional volunteer opportunities and a social value app to input their volunteering hours. Both methods are being underutilised at the moment."

The lack of budgeting is mentioned again in interviews. Social value managers need to make a 'business case' for all investments, but where the approval comes from, the social value management requirements are not fully understood. This creates frustration, as it is not only difficult, but sometimes impossible to meet the requirements without proper software and templates.

"We don't use any digital products, as we have no budget. We use contacts in industry and seek out opportunities that don't cost anything."

"We weren't at a stage to purchase a management software so they were just managed internally. We work with different partner organisations and use spreadsheets"

Some do not use any social value tools, not specifically for lack of budget, but rather because they are new to the topic and in the process of evaluating what they might need.

"All managed in house through spreadsheets and online portal - currently being looked after by a graduate in house."

"We have no impact assessment tools, we report against true value and who benefits from it."

"I've definitely noticed that we need a platform for reporting and for that sort of standardised capturing of what we're doing."

"Although not intentional, we lack good measurement and tracking practices/tools therefore there is some level of poor reporting that occurs"

"Just looking at the market. Nothing in place yet!"

Sustainability and ESG (environmental, social and governance) are initiatives that have become imperative in business with the threat of climate change and climate risk.

The main difference between these two frameworks for business is ESG is a measured assessment of sustainability using benchmarks and metrics. ESG is particularly important as ESG investing or responsible investing is a set of standards used by social conscious investors. This is also used in asset management for decision-making.

Sustainability vs ESG

What's the Difference and Why They Matter, HSBC, August 2023



We were also curious about what a dream tool would look like for different social value professionals; here are just some of their ideas!

“Partners, organisations, stakeholders would be able to access it directly themselves, and input data directly and it would already have all of the proxy values inbuilt.”

“To allow us to input our own kind of research that we’ve done independently of whatever framework we’re using, it would help us broadcast. We would be able to upload, for example, a master plan for a project and then it helps us broadcast what the opportunities are or we can upload a program into.”

reporting tools

Finding the right combination of tools for a given business that suits their priorities and goals can be tricky. However, the most important in decision-making is to distinguish the purpose of different kinds of technology, as they serve a very different purpose.

Read more on the main
social value management
product categories

Training & Education

Where do they get information and knowledge now?

In the interviews we found that most of the participants did not receive any official or mandatory training for their job. Some have attended Social Value UK's Social Value & SROI (Social Return on Investment) Practitioner Training course; studied sustainability in university or attended some other (unidentified) training courses.

"Training with SVUK, UN, drugs & alcohol issues and impacts, criminal justice system. No specific training on social value."

However, many social value professionals are pretty much self-taught and rely on peer to peer advice and their own research: *"So there wasn't really much out there in terms of social value training when I started in 2014. I'm self-taught and I don't think there's much in the way of training out there now, even around social value."*

"There's no formal training or qualification. It's all we learn on the job, learn from your own failings and other people's successes kind of thing."

"No training yet!"

"Not officially - upskilled myself."

"Training in the past. Stakeholder analysis training. Also, courses around sustainability goals."

"I was the first person in the social value role, so not much training, but self taught."

"No formal training in social value or social impact."

As there is very little academic research and very few theories around social value, professionals need to rely on other sources, e.g. materials provided by service and product providers and the few umbrella organisations covering the subject matter. A lot of professionals learn on the job by attending webinars, conferences, and networking events. They read guides, social media posts, blogs, monitor what competitors do, study policies

and methods online, partake in product demos and strategy sessions, and share best practices within their own organisation. Some of the most active social value professionals have created their own unofficial, yet frequently meeting network groups.

"I'm doing two or three or four probably seminars or training days/training afternoons a year, just to kind of keep up with current practice and so on can be best practice."

"We educate ourselves by sharing best practice, news and advising each other in bi-monthly social value meetings."

Some found they didn't need any more training, due to the independent work they do and the self-taught skills they have.

"It's probably a combination of just sort of keeping my nose to the ground and just being aware of what's going on around me."

In general, it comes across that companies are treating their social value managers as a novelty and that the skills for the job are considered prerequisite or their own responsibility to acquire. One such manager said it really well: *"I would never say no to any training and learning and doing things in different ways. Because obviously, I don't know what I don't know!"*

Some, but definitely a minority, said they were required to attend some mandatory training when starting their current jobs e.g. introductory courses on social value, foundation courses for management training, or training organised by social value platform providers: *"There is mandatory group training across the company, otherwise I am encouraged and supported to partake in conferences."*

Another important route to improve social value and learn in general is to get feedback on government tenders: *"I think because we're always tendering, then you're being constantly benchmarked and learn as you can see your score in bids. So we're saying, this is our best social value offer that we can deliver you for this contract."*

"Learning never stops. We're always tendering. We're always, we've always got live contracts."



What training are they lacking?

The lack of education and training was also mentioned as a challenge by multiple interviewees. However, in our survey, when the respondents could wish for improvements to their job role and what support they needed, 42% listed an official qualification for their job the least important. Also, a wider range of training was listed as the second least important by over 50% when put against board support; having a budget and working with streamlined social value frameworks and impact measurement methods.

Based on the deep dive interviews, this does not mean social value managers are not into learning. On the contrary, it is only that there are quite a bit of resources, challenges, and immaturity within the topic, so formal qualifications and systematic training is not on top of the wish list.

“What I’m lacking is the time for training”

Social value managers are expected to know ‘everything’ and to answer every demand set forward by clients or senior leadership, oftentimes without relevant training. Some talked about wanting training on sustainable development goals, ESG, accreditation courses on social value, and on contract negotiations: on reporting, on management and leadership skills.

“Project management training would be beneficial”, argued one social value manager, and “contract negotiation skills, because those two are paramount when you’re starting your voyage because you gotta influence internally and externally.”


Although the market offers various short-term/part-time sustainability courses, these options were not mentioned much at all. It seems that social value professionals are very used to, and unintentionally expected to, train themselves with whatever the market can deliver. Also, due to the diversity of the job role, the needs are also different from organisation to organisation.

“The training which does exist is things like measuring against the Green Book, some procurement stuff and some like the social value accredited training. That might not be what social value managers need in their role.”

The market also offers a wide range of different training and it is not always easy to tell which is worth investing time and resources into. There is no single centralised training source or voice for social value, making it difficult to choose which is the right form of training, which makes utilising existing training offerings even more difficult.

Hopes for the future

How do you want to see social value & its management in the future? Rank these from most (1) to least (6) important.



Board level commitments on social value and budget (4,99)

Standardised social value frameworks in the market to make things streamlined (4,32)

Different options for training programs for social value related matters (2,66)

Official qualification education for social value job titles (2,18)

Standardised measuring & reporting method on social value (3,68)

Transparency and audit deliverables to prevent greenwashing and bluewashing (3,17)



What kind of training is hoped for?

"It has been good to see the emphasis on social value, and impact management increasing over the last 5 years with more roles and better defined roles appearing on the market, but I'm looking for more training and professional development to continue supporting those in these increasingly complex roles."

From our survey, around 1/5th of respondents placed emphasis on receiving more training in the future for their career progression. Although this is important, and everyone seems to agree about the importance of training, what we have found is that there are so many other challenges in the job field. Therefore, when the question is raised about the most important / top priority for improvement, official training

and qualifications are not at the top of the list, as compared to more pressing issues of budget and board-level commitment.

Social Value framework harmonisation requests

Across the board, there also seems to be a strong desire for uniform reporting methods in social value: systems & frameworks that allow all necessary information to be inputted in an organised and intuitive way.

When asked what does your dream tool look like, one respondent said: *"Really we need something that is easy to use, to be able to upload and keep a record of what we have done that is flexible to users and offers some kind of metrics."*

Another person echoed this sentiment, stating: *"It would be nice to have software that would do reporting for you. Ideally the software would be something that is easy and cheap - good value for money."*

A key difficulty in the market is around the difficulty in marrying together different frameworks, reporting methods, proxies and calculations. Really there is a desire for: *"One central platform with centralised metrics. Ideally one metric for no matter which calculator you use to allow for flexibility."* It is a difficult balance for the market to strike, on the one hand allowing for flexibility in methods and frameworks as all companies look and operate differently and on the other, striving for centralised systems to make social value easier and more transparent.

Social Value Roadmap, SEUK:

"The measurement and tracking of social value lacks common standards and approaches, while data is patchy and accountability is mixed" and this is apparent in our research as well.

Networking and collaboration ideas

"I think we're seeing a shift within the industry of becoming a much more collaborative environment of sharing across sectors in the businesses."

There is a real desire for a community amongst social value professionals. 80% of our survey respondents expressed that they wished there was more sense of community for their professionals and keenly look for

networking opportunities wherever possible. Most have taken on this work on their own and found networks on LinkedIn, their existing jobs, or conferences and events.

Forming connections and staying connected is not always straightforward and there is a need for connectivity within industries and within the profession.

Are you looking for a community for social value networks



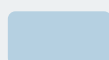
Yes, networking online (13,16%)



Yes, networking in person (5,26%)



Yes, networking online and in person (34,21%)



Yes, mentoring and best practice sharing (17,11%)



Yes, training & academy community (10,53%)



No (19,74%)



"I definitely think it's something that could improve. Because I feel like we're probably sort of an area of specialism that has probably sat in the shadows for a long time. And I feel like we kind of need to come out of it more."

"It would be good to have some sort of community this either once a quarter or something where you could all meet up on teams or face to face and kind of discuss best practice."

"I think that if there was a cluster like locally of developers or contractors working in the same area, we should be working together on a joint strategy rather than each doing different things. Because the community that we're trying to benefit is the same and then we're all doing different things at different times, and actually that can sometimes be quite counterproductive."

"what impact could play a role as a networking platform for those in the field & to share best practice."

As the social value industry evolves it is of paramount importance that we formalise and support the roles that are driving the strategies and delivery of meaningful social value to communities. Undertaking research to learn how this role is an essential driver in supporting communities is the first step to aiding professionals passionate about making a difference. There are hundreds of young professionals working in social value that this research is the first step in supporting their career development, it is also important to highlight the young professionals that are currently delivering social value in addition to their formalised roles that this research can be used to highlight the importance of establishing social value manager responsibilities within their organisation. Organisations should be consciously considering how social value roles can be accessible to those who may face barriers into employment that may have fantastic potential to support communities.

It is important to highlight this is just the first step, more work is needed by the entire industry to support social value professionals. Cross-sector collaboration is required within the social value industry to create clear career pathways, training and formal professional development to ensure that ambitious talented professionals can grow. Investing and supporting social value managers that are passionate, hardworking and understand community needs is vital for a business to continuously improve on the value they add to local communities. Investing in social value managers and their development is the best way to secure meaningful social value delivery to communities.

Olivia Sutcliffe
Responsible Procurement Manager,
Greater London Authority

Key Findings and Conclusion

This research project illustrates the vast diversity of social value professionals and the meaningful and pioneering work they are putting in day in and day out to make our world a better place. We wish to conclude with four key points to be reviewed, discussed, and acted upon in order to make the social value industry a more successful and better place to work in – and to ensure the intentions to make an impact on the ground actually happen in an effective and meaningful manner.

1. Recognition & respect for social value professionals

To reference a quote from earlier in the paper: “social value can not be treated as the ‘fluffy stuff’ anymore”. Social value as an industry, profession, and capability in business operations needs to be given the recognition and respect it deserves. These professionals are the driving force making sure social value becomes part of organisational DNA.

The dedicated professionals in these fields deserve to have a say in their specific industries and be recognised as a new group of professionals in the talent acquisition market. They need to have access to boardrooms, where they have an influence over strategy and business decisions related to social value.

2. Board-level commitment & budgets

One of the biggest factors holding back social value professionals is the barriers they face internally within their companies. Whether it is a lack of budget and board approval for social value related investments/resources or the constant uphill battle to motivate employees to get involved – an internal lack of commitment is making social value related roles increasingly difficult. Boards and company leadership have a huge business risk to mitigate when it comes to social value delivery, ESG, and mandatory sustainability reporting standards. The commercial success and the value of a company is more and more reliant on how companies approach sustainable practices and what kind of added value they create to our society.



3. Wild market of frameworks and standards

Another tricky factor for social value professionals is the nature of the immature, yet emerging market of social value. The so-called 'wild' nature of the market means things are evolving rapidly. New frameworks, standards, and tools are constantly popping up, and it seems to be a full time job to keep up to date about new developments.

There is no simple answer to define who should be in charge of defining and auditing local, national, and international frameworks and reporting requirements within, but one thing should be kept at the centre of things - Social Value Is About 'Doing'! No framework, planning, or measurement method, nor tool built to manage it should encourage a 'tick the box' mentality.

Any framework built to guide the inputs and added value to our society must be designed so that it matches both the real, pressing needs of society as well as respecting the capabilities, resources, and operational possibilities of companies delivering on such tasks.

In terms of measuring and evaluating results, international best practices must be applied and evidence of real impact demanded. Emphasis on hypothetical results and oversimplification of a matter as complex as social value, easily diverts the social value related investments to deliverables with no real value.

Overall, it seems there should be a digital hub for social value with comparison tools and information, networking and more. This source should be independent, all inclusive and enabler for cross-sector collaboration.

4. Digital tools & internal manpower for coordination

Social value being a complex mixture of community engagement, employment, and supply chain and sustainable practices makes operational management the key to success. Social value professionals are hugely underequipped when it comes to management tools and resources, in comparison to other organisation departments eg. finance, HR, marketing and sales.

No tool is a solution itself, however. Firstly, there needs to be a strategy, or at least some defined social value targets and ideas, before choosing the toolkit. Although many social value professionals are deeply hoping for ONE tool to manage the entirety of social value, this wish holds no ground in reality. Digital tools vary from social value and CO2 calculators to project management; from internal employee engagement softwares to managing external social value partnerships.

Ultimately, it is important that any digital tool supporting social value management should not override innovation, efficiency, and flexible delivery of social value. The balance of manpower and tools is not only the matter of budget, it is also about making sure the internal investment in coordination and administration are not overriding the real value provided on the ground.

We at whatimpact thank you for your time for having read the white paper and invite all interested parties to join our whatimpact.com community and enjoy our vast content library and platform features designed with and for social value managers!



whatimpact – with and for social value professionals

whatimpact.com is a social value management platform designed with and for social value managers. It is a one of its kind workflow management tool for planning and reporting on social value delivered with charities, social enterprises and supporting other local initiatives UK-wide. Our platform helps companies to manage volunteering programmes in a strategic manner, harnessing skills for contract specific social value requirements. whatimpact has social value data in one place, on a team dashboard.

Our mission is to improve the work flow and efficiency of social value management to save time and money to allow more resources to be invested in local social and environmental initiatives. Our reporting focus is on validated, proven impact to be used in procurement, ESG and CSR reporting.

Our customers vary from SMEs to larger organisations and the platform is used by wider social value management teams from dedicated social value managers, but also human resources, bid managers, communication and sales departments.



Social Value Delivery Paths, copyright of whatimpact Enterprises Ltd

This is what our customers say:



I thought whatimpact is a professional organisation who know what they're talking about, who really wanna make a difference, and they're doing it for the right reasons.

So I thought, these are the sort of people that I think we would like to be involved with.



One of the bid questions is always about social value.

So you'll have a question on methodology, you'll have a question on health and safety, a question on sustainability, and a question on social value. And this is where I use whatimpact platform to help me out.

whatimpact.com pointed us in the direction of how to actually do the work. So it didn't just kind of measure your output, it actually helped you to realise the most impactful outcome.



What I like about whatimpact is that it gives massively value for money and help you get as to how you're gonna be able to deliver the social.

The platform presents you with social enterprises and organisations that you can actually help, you can reach out to them directly and say, we can help you on this. You can see where they are in the different parts of the country, which is very handy.



Well we've had good feedback in tenders as we have used whatimpact.

It just makes life easier when you're writing the social value response in tenders. So that's been a good benefit!

whatimpact – Social value workflow management platform

Back-end service environment

Social value management dashboard

Training / consultancy

for whole team

Extensive social value material bank with webinars, strategy guides and other content.
Management support consultancy services

Plan

for bid writers & sales

Flexible social value planning tool for any kind of tender & aligned with the UK Government's Social Value Model.

Manage partners

for social value management team

Communications management with all delivery & VCSE partners

Report

for contract management & communications

Globally valid social impact reporting that contains comprehensive qualitative & quantitative impact data – PPN 06/20 aligned

Volunteering hub

for HR

Volunteering Management HUB harnesses your volunteering schemes for social value

Front-end service environment

Public marketplace for partnerships

Profiles with transparent data

Profiles for all platform members with verified data from Companies House & the Charity commission

Matchmaking mechanism

VCSE directory of 200,000+ possible partners across the UK – find perfect match based on cause, location, desired MAC or UN SDG

Public impact & partnerships

Monitor impact in local area with a public record of matches, projects supported & successful partnerships



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