

Version published September 2024

SOCIAL VALUE MANAGEMENT CERTIFICATE

Criteria and Evidence Form

Level 2 - Implement

# About the Social Value Certificate

The Social Value Management Certificate is looking at the standard of an organisations practice in managing the social value that is created (and destroyed) through its activities. This is not only about reporting social value; it is about gathering data, analysing it, and making informed decisions to improve your stakeholders’ lives through creating the most social value with the resources available. The Social Value Management Certificate can be awarded to an organisation, or a specific programme or project being run by an organisation.

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

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

# Levels of the Social Value Management Certificate

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

There are three levels of certification:

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

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

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

# Evidence for Level 2

This document sets out the criteria required for an organisation or programme to achieve Level 2 of the Social Value Management Certificate. Applicants must provide evidence that demonstrates each of the criteria listed below. This evidence will include documents that show the criteria being put into practice. This evidence can (for example) include social value reports, stakeholder maps, lists of outcomes, screenshots or exports from software used to manage social value, or meeting minutes.

Please note against each criteria how your organisation or programme has met the criteria and the evidence you have provided. You must clearly state where the evidence can be found within the supporting documents. For example, by stating the page and line number of a text document, or a tab name and cell reference in the case of a spreadsheet.

You should then submit both this completed document along with your supporting evidence. You can do this by uploading the files to our online application form. If you have any issues, please reach out to the team at [info@socialvalueuk.org](mailto:info@socialvalueuk.org).

Details of Applicant

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

# Criteria and evidence checklist for Level 2

## Stage 1: Creating Capacity

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

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| **Criteria number** | **Criteria** | **Evidence (to be completed by applicant)**  *Please explain how this criteria has been met, and indicate where evidence of this can be found (e.g. a file name and page number)* |
| 2.CC.1 | Our Social Value Policy includes a glossary of terms which defines:  - Indicators  - Inputs  - Materiality  - Outcome valuation  - Outcomes  - Outputs  - Social value  - Stakeholders  This glossary is available to all staff to ensure each term is used consistently. |  |
| 2.CC.2 | Our organisation has started to support all staff to improve their knowledge of social value. Our staff are receiving appropriate levels of training and understand why social value is important. |  |
| 2.CC.3 | A social value lead (or leads) within the organisation has been identified and has started working in this capacity. |  |

## Stage 2: Plan

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

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| **Criteria number** | **Criteria** | **Evidence (to be completed by applicant)**  *Please explain how this criteria has been met, and indicate where evidence of this can be found (e.g. a file name and page number)* |
| 2.P.1 | Our organisation has mapped out our stakeholder groups (including sub-groups) for some or all of our activities. |  |
| 2.P.2 | Our organisation is starting to engage with different stakeholder groups (not just our intended beneficiaries). A plan for this engagement has been developed and is in place. |  |
| 2.P.3 | For some or all of our activities, our organisation makes it clear which outcomes will be measured, reported on, and managed. |  |
| 2.P.4 | Our organisation has started to identify outcomes through stakeholder involvement. We have used open questions when defining outcomes. |  |
| 2.P.5 | Our organisation is starting to record unintended or negative outcomes experienced by our stakeholders. |  |
| 2.P.6 | Our organisation is using Chains of Events (or similar) to understand how our activities affect each of our stakeholder groups. |  |

## Stage 3: Do

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

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| **Criteria number** | **Criteria** | **Evidence (to be completed by applicant)**  *Please explain how this criteria has been met, and indicate where evidence of this can be found (e.g. a file name and page number)* |
| 2.D.1 | Our organisation is starting to record the inputs (time and resources) and outputs of our activities. |  |
| 2.D.2 | Our organisation is starting to record the number of people who experience each outcome (scale). This is informed through stakeholder involvement.  Optional: Our organisation also records the amount of change (depth) for each non-binary outcome. This is informed through stakeholder involvement. |  |
| 2.D.3 | Our organisation is starting to record the duration of each outcome. This is informed through stakeholder involvement. |  |
| 2.D.4 | Our organisation is starting to record the relative importance (value) of each outcome. This is through a financial valuation, a weighting, or a combination of both. This is informed through stakeholder involvement. |  |
| 2.D.5 | Our organisation is starting to record the deadweight of each outcome (i.e. how much would have happened anyway). This is informed through stakeholder involvement. |  |
| 2.D.6 | Our organisation is starting to record the attribution of each outcome (i.e. how much was down to others). This is informed through stakeholder involvement. |  |

## Stage 4: Assess

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

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| **Criteria number** | **Criteria** | **Evidence (to be completed by applicant)**  *Please explain how this criteria has been met, and indicate where evidence of this can be found (e.g. a file name and page number)* |
| 2.A.1 | Our organisation conducts a materiality assessment of our outcomes. This assessment is based on whether each outcome is relevant and significant. |  |
| 2.A.2 | Our organisation is verifying our social value data and has a process in place to verify our social value reports with our stakeholders. |  |
| 2.A.3 | Our organisation is producing social value reports. These are produced with an appropriate level of rigour and conform as much as possible to the Principles of Social Value.  We have produced at least one internal or external social value report. |  |
| 2.A.4 | Optional: Our organisation has a plan in place for engaging with a third-party which reviews or assures our external social value report. |  |

## Stage 5: Revise

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

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| **Criteria number** | **Criteria** | **Evidence (to be completed by applicant)**  *Please explain how this criteria has been met, and indicate where evidence of this can be found (e.g. a file name and page number)* |
| 2.R.1 | Our organisation is starting to set quantitative targets for stakeholder-defined outcomes based on social value data.  This has been done for at least one of our activities. |  |
| 2.R.2 | Optional: Our organisation is starting to use social value information to set impact goals for the organisation (i.e. make strategic decisions). |  |
| 2.R.3 | Our organisation is starting to use social value information to decide which activities to run or expand (i.e. make tactical decisions). |  |
| 2.R.4 | Our organisation is starting to use social value information to improve existing activities (i.e. make operational decisions). Stakeholders are consulted on these changes before they are made. |  |
| 2.R.5 | Our organisation is starting to review and improve how we measure and manage our social value. |  |