

**Social Value**

# Success Factors

The key components of a successful  
Social Value strategy

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# Introduction



**Guy Battle** Social Value Portal CEO

**Social Value is the currency for conducting responsible, sustainable business – and all organisations have a growing responsibility to meet this challenge head-on.**



**2012**

**The Public Services (Social Value) Act**

The 2012 Public Services (Social Value) Act and subsequent Policy Notes have played an essential role in embedding Social Value in public sector procurement. Now, over a decade later, further change beckons with the Procurement Bill, which will make ‘the public good’ an even more central consideration in UK procurement decisions. Social Value has huge promise for the private sector too, driving talent acquisition and supply chain transformation.



**Fast forward >>**

**2023**

**The Procurement Bill**

In this report, we will reveal the key enablers of a successful Social Value strategy and share our Social Value Success Factor Model. This model is underpinned by our survey of **700+** Social Value stakeholders, which questioned stakeholders across the public and private sectors about the present and future of Social Value.



**The Future...**

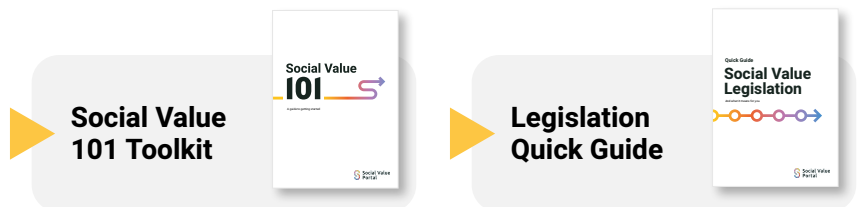
**82%**

**of organisations will spend more time supporting Social Value in the coming years.**

The data, insights, and guidance in this report will provide an invaluable tool for organisations that want to amplify their Social Value. With it, you can start building a structure, culture, and strategy to deliver success.

You can find out more about the background of Social Value with these useful resources:

**Social Value is here to stay**





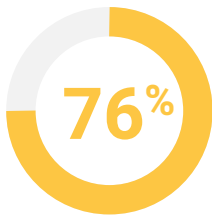
# Key report highlights

# 1

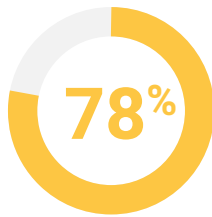
## Social Value is becoming a critical factor for all organisations

Whether the goal is creating a competitive advantage, engaging talent or growing market share, Social Value clearly has a big role to play in organisational success.

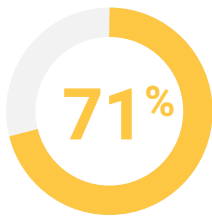
When we asked respondents **how important Social Value is for different operational areas**, they feel it is:



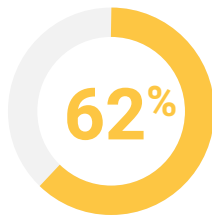
very or extremely important overall



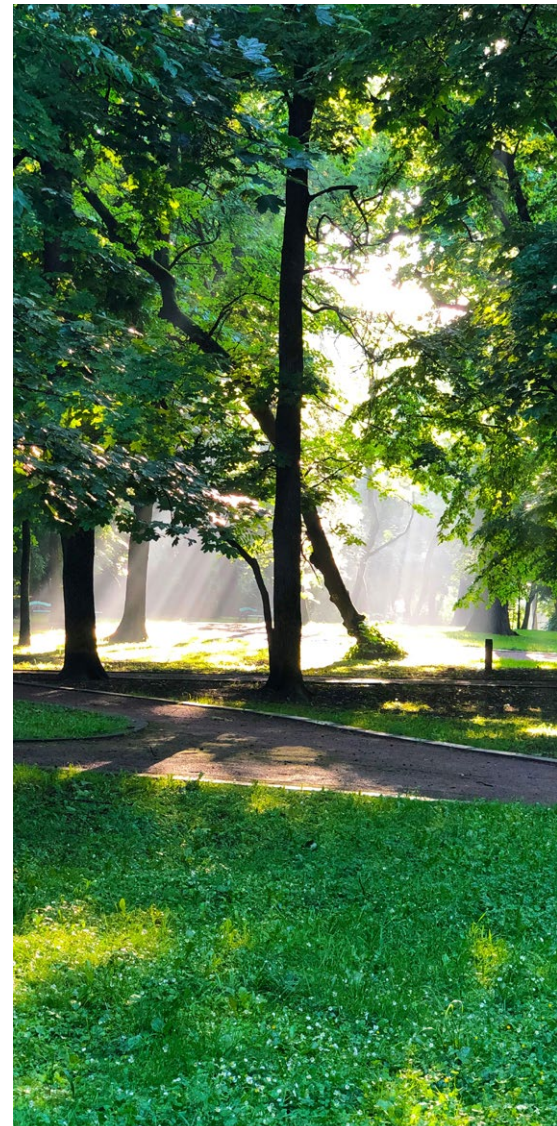
important for winning bids



important for competitive advantage



important for staff engagement



**We all own the planet, and we all benefit in some way from economic and social improvement. Social Value is everyone's business.**

Director, STAR Procurement







# 2

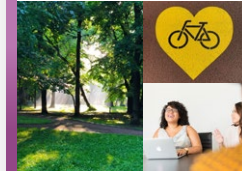
## Organisations are embedding Social Value into their operations

There is huge potential to drive societal benefit across various sectors and industries.

Procurement is an especially key area, as noted in a joint whitepaper published by Social Value Portal and the National Social Value Taskforce.

It's no surprise then, that so many organisations are focusing on enhancing their Social Value by embedding it in their operations. In fact, our research found that **59%** of organisations have a CSR or Social Value focused executive, and another **7%** will do in the next year.

Our Social Value Roadmap  
**Delivering a Social Value Economy**



Social Value Roadmap

# 59%

Organisations have a CSR or Social Value focused executive

+7% in the next year

# 3

## More resources and external support are needed

Social Value is set to become a bigger priority in the near future. Our survey found that **82%** of respondents expect their organisations to spend more time supporting Social Value over the next three years. This number was even higher among public sector respondents, at **88%**.

This means that Social Value will require more resource and further investment moving forward. Nearly half of our respondents said that they were already facing this challenge.

# 82%

expect their organisations to spend more time supporting Social Value over the next three years

# 40+%

needed external support to create or deliver a Social Value strategy

As leaders of the Social Value movement, we look to explore how organisations can take their Social Value strategy from good to great, by following our **Success Factors Model...**



### Supply Chain

Make Social Value requirements explicit in contracts  
Analysis and performance management  
Co-operation



### Culture

Make Social Value core to your culture  
Empowered and enabled teams  
Enable easy engagement with Social Value



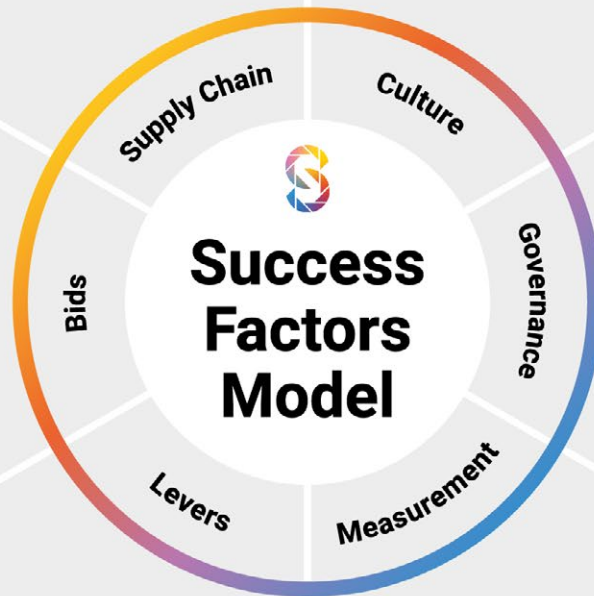
### Bids

'6 steps to pro' bidder best practice  
Local engagement  
Keep learning



### Governance

Accountable Social Value champions  
Clear and relevant policy  
Understanding of local and national needs



### Levers

Partner collaboration  
Effective activation of workforce and assets  
Learning and improvement



### Measurement

Defined measures relevant to needs and priorities  
Prioritise consistent and standardised data capture  
Comprehensive and engaging reporting

## About the Social Value Success Factors Model

Social Value Portal has helped numerous organisations create Social Value strategies, execute Social Value initiatives, and measure the results. Our survey asked experts to identify the factors that help and hinder a Social Value strategy.

From the responses, as well as the insights of our experts, we identified six key focus areas. Our Social Value Success Factors Model captures them in a simple, comprehensive system.

**See our Success Factors in action...**



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# Success Factors in Action



# Culture

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**Unless a strong understanding of, and enthusiasm for, your organisation's Social Value objectives permeates all its levels, teams, and functions, you may struggle to make a mark.**

Goals which hinge on 'culture' can seem vague or hard to gauge. But with the right steps, you can start influencing your organisation's values, behaviours, and principles immediately.

## Success Tip #1

### **Make Social Value core to your culture**

All organisations have a vision of what success looks like. When starting your Social Value journey, be sure to decide where Social Value fits into your goals and future.

This means taking your organisation's view of value beyond the financial, incorporating social, economic, and environmental impacts.

Aligning your pre-existing efforts, with a focus on the most high-impact initiatives, can also be a highly effective starting point when aiming to create a Social Value culture.

### **Social Value Potential**

**73%** of respondents said their organisations' missions are aligned to Social Value







Success Tip #2

### Empower and enable your teams

To maximise your organisation’s positive impact, find ways to channel the ideas coming from your teams.

**Start with encouragement:** show your people that you value their thoughts and contributions. Create structures to receive proposals, evaluate them, and carry the right ones forward, while keeping those that originated them, involved.

One highly effective strategy is to reflect the organisation’s Social Value roadmap in team or individual goals.

44%

didn’t have Social Value incorporated into their objectives compared to 40% that did

Success Story

**Compass Group**, one UK’s largest employers and a Social Value Portal member, has built a people-first philosophy, and a true Social Value culture.

In 2022, Compass launched its “Social Promise”, a commitment to support one million people inside and outside the organisation. [Read more>](#)



Success Tip #3

### Enable easy engagement with Social Value throughout the organisation

When working to engage staff around Social Value, organisations typically find pockets of enthusiasm, whilst others prove harder to entice.

Clear communication is essential here. Make your people aware of opportunities to contribute and promote the successes you are already having. If possible, provide visual representations of your organisation’s strategy and achievements.



**Colleague engagement, through understanding opportunities to contribute, is key.**

A Social Value Success Factors Survey Respondent comment





# Governance

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**A successful Social Value strategy requires strong direction from the organisation's leadership. But good governance isn't just about giving orders. It's about encouraging your people to find new ways to create societal benefit where evidence shows it is needed.**

**Here are some key steps you can take to improve your Social Value governance:**

## Success Tip #1

### **Create accountable Social Value champions**

Having one or more 'Social Value champions' – individuals with standout Social Value knowledge and passion – in the team, will elevate your Social Value programmes considerably.

They can operate at any level, but seniority will naturally extend their influence. As such, many organisations are choosing to drive Social Value from the very top:

#### **Companies with a Social Value or CSR-focused executive**

**59%**

**Organisations**  
**+7%** in the next year

**69%**

**Private sector**

**71%**

**Real estate and construction**





**Success Tip #2**

### Create a clear and relevant policy

A Social Value culture needs to manifest in concrete ways. You can enable this by creating real guidelines and incentives.

Our survey indicates that Social Value is a frequent topic of conversation for many leadership teams: half of our respondents said Social Value regularly comes up in their board meetings.

The next step is to truly embed Social Value into practices, processes, and structures.

**Success Story**

**Rotherham Metropolitan Borough Council**, one of our members, established a cross organisational focus on Social Value, with the help of our platform and the TOM System. This has included the creation of a Social Value commissioning toolkit and clear guidance for bidders and suppliers. [Read more>](#)



**Success Tip #3**

### Understand local and national needs

Social Value initiatives are most impactful to people's lives when they respond directly to the needs of communities.

It's no surprise, then, that **nearly two out of three** respondents think local and community partnerships are 'extremely important' in delivering Social Value.

There may already be Social Value-focused organisations and initiatives active in the local area. Rather than duplicating efforts and resources, think about how you could add new value through a partnership or collaboration.

**Success Story**

**Durham County Council** The collaborative and local need-driven strategy of the County Durham Pound initiative exemplifies strong governance in action. Using the TOM System to target community priorities, these 11 partners are leading an innovative approach to place-based Social Value. [Read more>](#)



We recommend carrying out a dedicated **Local Needs Analysis** into the key priorities and needs of a local area, using sources such as local policy and the Indices of Multiple Deprivation.



# Measurement

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**Whilst governance provides direction, measurement enables you to track your progress, and demonstrate results to your clients, investors, or other stakeholders.**

**How should you get started with Social Value measurement? Here are some pointers:**

**Success Tip #1**

**Establish defined measures relevant to needs and priorities**

Measuring Social Value can't be done in isolation. Instead, find ways to align the metrics against which you will measure success, with the needs and priorities of your own organisation, and the communities you operate and recruit in.

For the highest standards of rigour and credibility, we advise validation of your Social Value by a third party. With relatively few organisations yet taking this step, third party validation is a big opportunity to stand out.



**Social Value validation by a third-party**

**27%**

**Organisations**

**33%**

**Real estate and construction**

**29%**

**Private sector**

**21%**

**Public sector**





Success Tip #2

### Prioritise consistent and standardised data capture

Accurate and robust data is a primary enabler of effective Social Value measurement.

Collating, validating, and interrogating your Social Value data will enable your teams and leadership to make informed strategic decisions. At Social Value Portal, we believe this is key, which is why we validate our members' data.

The best way to facilitate this is to implement a specialist framework, such as the Social Value TOM System. With a single point of truth, you can streamline the process of assessing your Social Value impact. It is also key to put in place processes which enable effective data capture across functions and activities.

Success Story

### Islington Borough Council

After tracking an incredible **£1.24m** of Social Value against its Affordable Workspaces Programme, Islington Borough Council is now planning to embed the initiative into its planning processes. [Read more>](#)



Success Tip #3

### Create comprehensive and engaging reporting

Measurement will give you the information you seek, but the way you communicate your Social Value internally and externally is equally important.

#### Confidence that Social Value reports are read/understood by stakeholders:



To bridge this gap, focus on creating comprehensive and engaging reports that make your organisation's Social Value journey relevant to the wider values and goals of your stakeholders. This should combine quantitative insights with qualitative ones to tell a full Social Value story.





# Levers

**Your levers are the initiatives and actions which power your Social Value journey – they are effectively the gears of positive change.**

By harnessing the full power of your internal resources and capabilities, you can massively enhance your Social Value output.

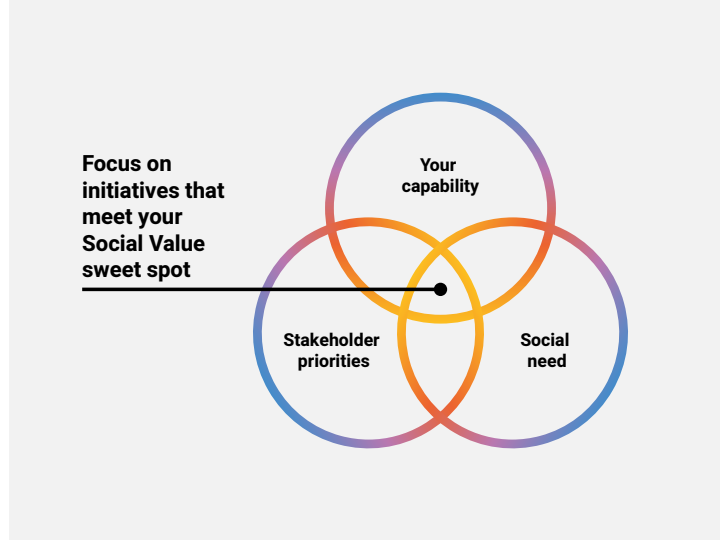
Here are three of the most impactful ways to turn your levers toward Social Value:

**Success Tip #1**

## Collaborate with partners

Collaboration is a cornerstone of any effective Social Value strategy. By seeking out like-minded businesses, clients and not-for-profits, you will extend your impact and be able to align your Social Value activities and interventions to local needs.

Local partnerships will also help you identify the most effective ways to create societal impact. Our research shows that this knowledge is already out there:



### Percentage of companies who felt they knew which initiatives had the most positive societal impact

**65%**  
Organisations

**55%**  
Public sector

**66%**  
Private sector

**71%**  
Real estate and construction



**Success Tip #2**

### Activate your workforce and assets

Our survey found that **59%** of respondents were only 'somewhat confident' or were 'not confident' that they could develop a Social Value strategy with current resources.

Concern was highest among public sector respondents, with **63%** only 'somewhat confident' or 'not confident'.

This underscores the importance of engaging your workforce in your Social Value journey and making the most of the resources you do have. Consider how you can equip your teams with the right knowledge, tools, and training to drive Social Value with existing assets.

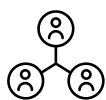
**Success Story**

#### Ebsford Environmental

After winning Solihull Council's 'Wildlife Ways' project, Ebsford Environmental set up an internal competition to see who, within the business, could deliver the most Social Value. [Read more>](#)



**We often hear that it's more difficult for SMEs to deliver Social Value because they don't have dedicated resources and the time it takes is just not available to them. We've seen it can be done, and it's about changing the organisation's mindset. In many cases, like Ebsford Environmental, it's easier to deliver Social Value because you have your whole organisation thinking and working towards providing more; it's not just isolated into a single role.**



Emma Tebbutt, Commercialisation Manager at Solihull Council

**Success Tip #3**

### Commit to continuous learning and improvement

Social Value is ever-evolving – staying up to date with current needs and best practice requires commitment to ongoing education.

To keep pace with the changing landscape, invest in learning and development for your teams.

Encourage your teams at all levels to stay informed about new trends, best practices, and innovative approaches. Foster a culture of curiosity, in which staff feel comfortable asking questions.



# Bids

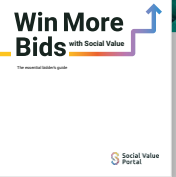
**Social Value opens many doors for many different businesses.**

**For suppliers to the public sector, it is a non-negotiable component of winning bids and securing more work. In this way, Social Value is revolutionising the economic incentives which underpin huge sections of the UK economy.**

Effectively integrating Social Value into your bids will set you apart from competitors and stand you in good stead to access lucrative and exciting projects. You can start to achieve this with the following steps:



**Win More Bids guide**



## Success Tip #1

### Follow our Bidder Best Practice

In our **Win more Bids guide**, we outline our **'6 steps to pro'** guidance for organisations looking to improve the Social Value components of their bids:

#### 6 steps to pro



# 2x

**Double your chance of winning a bid by winning at Social Value.**

Social Value Portal analysis competitive public sector project bids 2021-23



**Success Tip #2**

### Create Local Engagement

Local and community partnerships play a pivotal role in delivering Social Value.

In this instance, we would advise private sector bidders to note the enthusiasm of public sector procurers for local community engagement.

**Respondents who considered local relationships extremely important**

**62%**

All organisations

**59%**

Private sector

**65%**

Public sector



**Success Tip #3**

### Keep learning

Like any business area, continuous improvement is the best route to long term success. The more your organisation commits to integrating Social Value into bids, the more effective those bids will become.

Our research found that **25%** of respondents were not confident that they could create an effective Social Value bid.

This demonstrates a need for further refinement and education around the Social Value in bidding processes.

**25%**

**of respondents lack confidence in their ability to build competitive Social Value bids**





# Supply chain

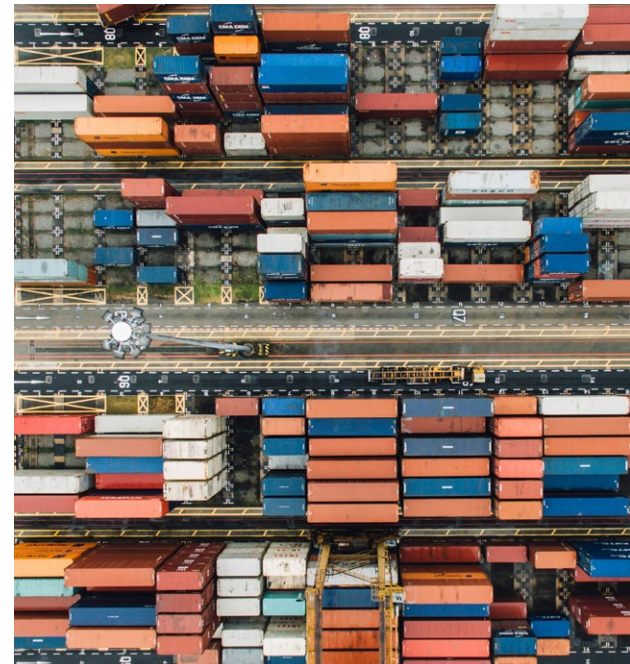
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**As we have discussed, procurement presents an unmatched opportunity to incentivise Social Value delivery.**

However, the tendering process within procurement activities is not always straightforward, with many lessons still to be learnt across the board.

We questioned bidders about their experiences responding to tenders and carrying out Social Value commitments.

Here are some key areas that we would advise procurers, in both the public and private sectors, to focus on:



## Success Tip #1

### Make Social Value requirements explicit in contracts



**The client often does not have a clear goal of how they would like Social Value to be delivered.**

A Social Value bidder's comment



When it comes to embedding Social Value in tenders, clarity is key.

One respondent said: **“Social Value is not normally specified in ITTs/PCIs and is often treated as an afterthought.”**

To successfully integrate Social Value into your procurement, clearly define expectations, objectives, and desired outcomes in your procurement documents.

This will enable both your organisation and your suppliers to follow a well-defined path.





**Success Tip #2**

**Analyse and actively manage supplier performance**

To maximise Social Value across the supply chain, buyers must continually engage with suppliers and provide constructive feedback.

We advise creating and implementing a robust system for evaluating supplier performance related to Social Value objectives. This will better align your Social Value goals to those of your partners.



**Too often, we're left wondering which Social Value themes are important to the client...**

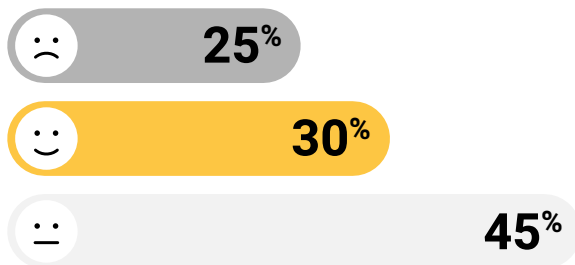
A Social Value bidder's comment

**Success Tip #3**

**Cooperate with your suppliers**

Effective collaboration between procurers and suppliers is pivotal to successful Social Value creation.

**Client-supplier communications satisfaction**



Both procurers and suppliers should understand the Social Value requirements and work together to deliver. A dedicated engagement session can be an excellent way to create this alignment early on.

**Success Story**

**STAR Procurement**

Social Value Portal member STAR Procurement is demonstrating the impact of a robust Social Value measurement system in its work procuring goods and services for partner councils.

Using the TOM System, they have helped their partners to make savings and generate positive impact across their supply chains. [Read more>](#)

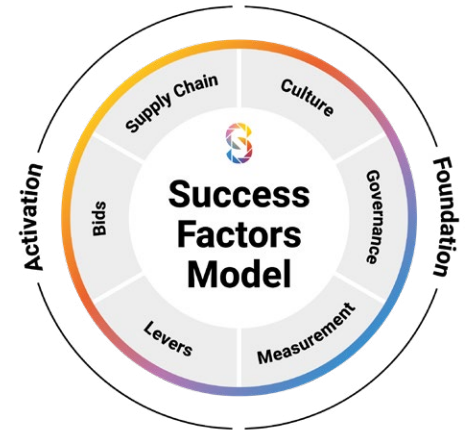





# The Social Value Success Factors Model: A holistic approach

The Success Factors Model is a tool for different organisations to understand their own strengths and weaknesses. Depending on sector, industry, size, and level of Social Value development, it may be prudent to give differing levels of attention to different Success Factors.

What is true across the board, however, is that the Social Value Success Factors function as an interconnected system. If any single one is underdeveloped, your Social Value journey will be incomplete and constrained:



## Success Factors Impact

Culture	Governance	Measurement	Levers	Bids	Supply Chain	
✓	✓	✓	✓	✓	✓	= Success 
✗	✓	✓	✓	✓	✓	= Disenfranchised
✓	✗	✓	✓	✓	✓	= Haphazard
✓	✓	✗	✓	✓	✓	= Disbelief
✓	✓	✓	✗	✓	✓	= Frustrated
✓	✓	✓	✓	✗	✓	= Uncompetitive
✓	✓	✓	✓	✓	✗	= Under achieving

Illustrating the importance of all factors working together for success, inspired by highly regarded models of change.



# Social Value Quick Wins

Here are some ideas to start implementing the Social Value Success Factors.

## Culture

- ✓ Build engagement by arranging a 'Social Value Day' bringing staff, suppliers, and partners together.
- ✓ Demonstrate commitment from the top by involving the Executive team in volunteering, charity and community events.
- ✓ Highlight the real life stories which bring meaning to the good you are doing.

Enhance with: Our Strategy Development sessions

## Levers

- ✓ Maintain an ongoing dialogue with community groups to ensure relevant local Social Value can be delivered effectively.
- ✓ Pool resources, for example by arranging a volunteering day with other business partners. This can enhance impact and support activities that you may not be able to execute yourself.
- ✓ Incorporate Social Enterprises into your supply chain.

Enhance with: Our dedicated Implementation Support services

## Governance

- ✓ Introduce a 'Head of Social Value' role to bring consistency and oversight across all projects and initiatives.
- ✓ Consider integrating Social Value into objectives and performance reviews.
- ✓ Create a formal review at least annually to align delivery with needs and create the best impact you can.

Enhance with: Our analysis and training

## Bids

- ✓ Be specific and targeted. For example, 'expert advice' volunteering delivers a greater level of Social Value than generic volunteering.
- ✓ Provide lots of detail in the qualitative element. For instance, in apprenticeship weeks, discuss your apprenticeship policy, partners, and any qualifications achieved.
- ✓ Ensure the Social Value you deliver as part of the contract is validated by a third party to add robustness.

Enhance with: Our Strategic Bid Support

## Measurement

- ✓ Leverage a data capture network within the organisation, with a clear responsibility split across the measure types.
- ✓ Create a Social Value feature section within your intranet and website to help stakeholders understand why it matters and how you manage delivery.
- ✓ Focus on initiatives which are within your power to deliver. It is better to do a few things really well than to spread resources thin and target outcomes that aren't material to your core purpose.

Enhance with: Our Social Value TOM System, platform, and validation

## Supply chain

- ✓ Engage all potential suppliers with a 'meet the buyer' event so your supply chain is equipped to support your priorities.
- ✓ Support smaller bidders by placing a greater weighting on the qualitative element of bids.
- ✓ Celebrate supplier achievements with awards.

Enhance with: Our procurement training and evaluation

**What's the next step? Learn how to amplify your Social Value...**



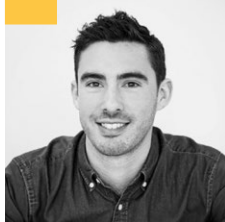
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# Amplify your Social Value



# Amplify your Social Value Strategy



**Ed Lang**

Social Value Portal  
Head of Strategy &  
Reporting Advisory

**We often find that a good Social Value strategy is within closer reach than expected. Along with the factors we've discussed, the hidden ingredient to success is simply dedicated attention – it requires the investment of time and resource. At Social Value Portal, we dial up the volume on both of these, with a focus on problem-solving, driven by genuine curiosity about our partners. This allows us to hold up a mirror to each organisation we work with and establish a clearer, more defined and coordinated direction.**

Solutions that are co-created by Social Value experts, by those delivering the impact, and by those receiving the benefits, have true staying power.

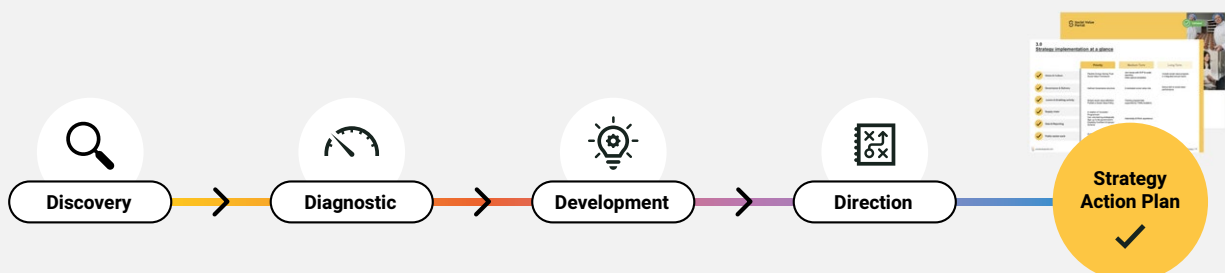
This is attainable whether you are a bidder, buyer, or business - provided there is a commitment of attention, time and resource. Social Value delivery requires a bespoke solution for each and every organisation. To form an action plan that captures the goals and needs of all stakeholders,

it is necessary to get under the skin of your operations with an honest analysis of existing strengths and areas for improvement.

For example, our Social Value diagnostic reveals key opportunities and challenges, culminating in an overall score, enabling benchmarking against comparable organisations. An effective strategy provides the clear direction that will transform your Social Value aspirations into a reality.



## Social Value Strategy Programme







# Delivering your Social Value Strategy



**Claire Ollington**

Social Value Portal  
Customer Success  
Director

**Successful Social Value is the outcome of the right commitment to building the essential foundations and embedding them into the heart of your organisation. Starting from a measured baseline, strive to learn, collaborate, share and continuously improve – and you will drive meaningful results.**

Like most things in life that really matter, a Social Value strategy needs time and attention – and some experience too.

But with motivation and dedication will come tangible benefits for your employees, your organisation, your stakeholders and your local community.

Our specialist Customer Success team provides our members with end-to end support, guiding them towards co-created goals and a win:win scenario.

In fact, as the market leader, Social Value Portal is instrumental in helping industry leading organisations across the public and private sectors to shape and deliver positive societal contributions to people, place and planet, with proven results.



**Find out what we can do for you.**



# Social Value Portal: Shape it, Prove it. Share it.

The complete solution to measure, manage and report your Social Value with confidence.



## Consulting

Work with our Social Value Specialists to develop the most effective Social Value programme for your organisation.

**Your Social Value, amplified.**



## Measurement

Our endorsed TOM System sets the standard. Quantify and benchmark your Social Value activity with confidence.

**Your Social Value, quantified.**



## Platform

Our single integrated platform to accurately manage, record and report your Social Value activity.

**Your Social Value, managed.**



## Support

Discover how membership and our continued specialist support provides additional benefits to your organisation.

**Your Social Value, optimised.**



## Reporting

On-demand reporting to share with stakeholders and stay on track.

**Your Social Value, validated.**



## Academy

Our Academy provides a comprehensive eLearning programme to transform you and your team into pros.

**Your Social Value, mastered.**

## Backed by and aligned with...



Government endorsed



UN Aligned





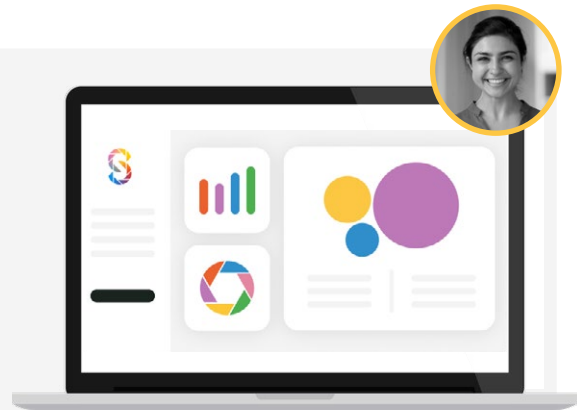
## Get started now...

Wherever you are on your Social Value Journey, here are some ways we can help:

### 30min Discovery Session

Book a complimentary call with one of our specialists to see how you can amplify your Social Value.

**[Book now](#)**



### Useful resources

Learn more about the movement with our resources below:

**[News and Insights >](#)**

**[101 Toolkit >](#)**

**[Bidder's Toolkit >](#)**

**[About Social Value Portal>](#)**

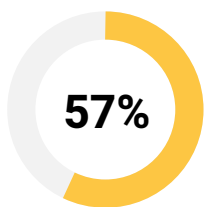
**General enquiries:** call: 0203 355 0530 | email: [info@socialvalueportal.com](mailto:info@socialvalueportal.com)



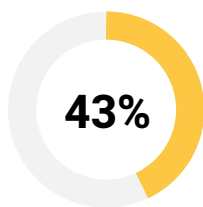
## About this survey

Social Value Portal hosted the Success Factors Survey between the 12th of June and 4th of August 2023. Participants were entered in a prize draw to win a £500 donation to a charity of their choice.

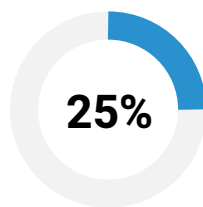
The survey received 705 responses from organisations with an interest in Social Value across a range of sectors and industries, including central and local government, professional services, and construction and real estate.



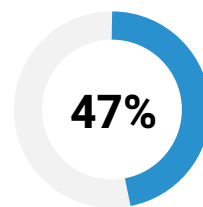
Private sector



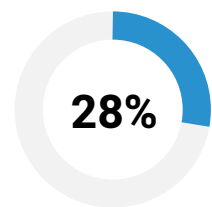
Public, 3rd and social sector



CEO/Exec/Director



Manager



Other



**It's important that everyone on the team understands the importance of Social Value and how it fits into the business plan.**

A respondent's comment



Some of our members leading the Social Value agenda

accenture

KPMG

Landsec

Nuneaton SIGNS

SIEMENS energy

Balfour Beatty

Durham County Council

Waltham Forest

COMPASS GROUP

STAR PROCUREMENT

bam

energy saving trust

lendlease

Phoenix

SUNBELT RENTALS

BARINGS

EQUANS

LOVELL PARTNERSHIPS

Ramco surplus sorted

LIBRARY HITTING

BOUYGUES

G4S

Lyreco

Roche

COMMUNITY FUND

BRISTOL CITY COUNCIL

GallifordTry

MARS

Salford City Council

Transport for Greater Manchester

BT Group

Goram Homes

Met Office

Sanctuary

UNIBAIL RODAMCO WESTFIELD

Cambridgeshire County Council

Government Property Agency

mitie

savills

Wates

CANARY WHARF GROUP

GREAT LONDON AUTHORITY

MULTIPLEX

SCAPE

WEST MIDLANDS POLICE

CHANGE Please

ISLINGTON For a more equal future

NHS London Procurement Partnership

serco

wsp

Nottinghamshire County Council

Sheffield City Council

Proud users of the

Social Value TOM SYSTEM



The people, platform and programmes that support organisations to measure, manage and report on the economic, community and environmental benefits they contribute to society.

Join the Social Value movement.  
Book a discovery call with our experts:

**call: 0203 355 0530**  
**socialvalueportal.com**



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