

# Assurance Case Studies

Social Value UK offer a range of assurance and accreditation services on behalf of Social Value International. You can become an Accredited Practitioner by fulfilling the following criteria:

- Be a current member of Social Value International
- Complete an accredited training course
- Be the main author on an assured report

Are you interested in finding out how assurance could be useful to you? In this document there are a some case studies from Accredited Practitioners that show the benefits of the assurance and accreditation services Social Value International offers.

## Accredited Practitioners

### Hannah Marsh

I previously worked for a Housing Association of which part of my role comprised leading on our Corporate Social Responsibility Strategy. I became aware of SROI and started to use this to help quantify and improve the social value of our projects. After attending the Social Value training, I felt the natural next steps to enhance my learning would be to submit a report for assurance and consider becoming an Accredited Practitioner. As I continued to learn about SROI, my passion for social value led me to start my own business supporting a range of organisations with impact measurement. It was at this point that I felt becoming an Accredited Practitioner would add strength to my business and give clients, and indeed myself, added confidence in the process.

The assurance process was a learning curve! I wasn't sure what to expect at first but found that the whole process really improved my understanding of the principles. Typically, when you first submit a report, an assessor will come back with recommendations that you then have five weeks to review and update. In addition, you have the opportunity to speak with the assessor to run through the recommendations in more detail. I found this really useful in understanding where I needed to explain myself in more detail. The assessors may also challenge some of your assumptions and this can support your learning. You are given five weeks for the recommendations so I used the time to critically review my work and conduct additional research and engagement as required. The assessors are there to help you and all of my experiences with the assessors have been really positive – I find that I learn something new every time I submit a report for assurance.

On a professional level, I have found that being an Accredited Practitioner has been invaluable. Professionally, as a consultant, it gives my clients an added level of confidence and adds weight to the whole process – particularly those that are less aware of social value to begin with. I always explain to potential clients that I am Accredited and that this demonstrates my ability to apply the principles correctly. Most recently, it has enabled me to become an assessor which I see as a great opportunity to further my learning and continue to develop my understanding of the assurance process. Becoming Accredited has furthered my professional development and even on a personal level has given me confidence in my ability to complete SROI analyses.

I would encourage those that conduct SROI analyses regularly to become an Accredited Practitioner and would advise them to make use of all of the tools available to them; Social Value UK have produced a number of guidance notes that are really helpful, particularly the assurance checklist and have collated assured SROI reports that can be viewed. Also, don't be disheartened if you receive a list of recommendations after submitting

your report, just make the most of the discussion with the assessor to understand how you can meet the criteria. Learn from the recommendations and ensure you are able to evidence back to the assessor how you have taken their comments on board.

Remember that becoming an Accredited Practitioner is just the start of the journey – your learning will continue and your understanding increase with every project you do!

## Yulia Romaschenko

Primarily, I wanted to be an accredited practitioner because I wanted to make sure I did things right when working on my SROI report. Mine was the first Russian SROI submitted for assurance and the assurance and accreditation definitely made it more credible for our client, stakeholders and the sector at large. Also CAF is building SROI capacity within the organization globally and it is very important for us to have people accredited for SROI so that they could disseminate the knowledge across the organization and contribute to CAF's expertise in the third sector.

For me the assurance process was very smooth, there were not that many comments to my report and not many amendments to be made. The comments I did receive from my assessor helped me to look at the data I was working with from a different angle. I was looking at the outcomes for a stakeholder group and I analysed how many of them experienced the positive change and to what extent but I did not analyse those who did not experience the positive change, so my assessor encouraged me to look at this subgroup of stakeholders. When I looked at this group of stakeholders it turned out that they had not experienced any change at all, but the situation could have been different: the change could have been negative and I could have omitted it from my analysis and calculations. There were other useful comments about the financial proxies I used and the theory of change for the program I analysed. In general, after the amendment period I felt my report improved significantly.

My advice to people who want to get accredited would be to take their time working on their SROI report as sometimes it is good when you can put it aside for a while and then come back to it and have a fresh look. You should be ready for some extra work during the amendment period and it's useful if you keep all of your notes and data because it may be needed when doing amendments.

In the short time since I became accredited I have been coaching my colleagues who working on an SROI report for another programme in Russia. The fact that I am accredited gives me the confidence I need to be the coach! It is great to feel part of an international professional community as an Accredited Practitioner and the fact that I am accredited adds credibility to CAF as the organization that provides SROI services and has plans to launch SROI trainings in Russia.

## Caroline Gardner

As a consultancy organisation we work a lot with quality standards in various social service fields and we support organisations to attain these. Quality standards are not without challenges, however time and time again we have seen them be effective platforms to bring credence to a type or work or service, to be a platform for learning and quality improvement and to raise the bar. Therefore if there is anyway we can work to quality standards we will take this. We like to affiliate with third level providers wherever possible and we really believe in the accreditation process for SROI. We aim to keep improving the standard of our work and our clients, and the assurance and accreditation processes support this. In fact we will not do an SROI report that is not accredited, if the client cannot afford it we will use another methodology that will support them to undertake an accredited SROI at a later date.

The Accredited Practitioner training was good but the first report is definitely a challenge. At the start of the

process I advise writing some checklists so that you don't miss collecting information at each point in the process, as going back to people is time consuming. Also it's key to read other reports, these really help with your understanding of the different ways to present information. At the end of the process the reports from the accreditation process are very useful, if you don't understand the commentary by your assessor, speak to them and talk it through, they are a resource to your learning.

Since I became an Accredited Practitioner I have more tools and a deeper understanding of measuring impact and as an organisation we aim to keep developing this. We all get better through dialogue on these important issues. As a network we really believe in measuring impact and the role of SROI in this, we have a lot to give others and people are very interested when the process, principles and rationale are explained in simple terms. My advice to those interested in joining the network and those already in the network is make sure you can explain all the core concepts to a colleague in simple and clear language, if you can't then keep reading and thinking until you can.

If you're interested in becoming an Accredited Practitioner - do it! Good luck!

