

**SOCIAL VALUE**  

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**INTERNATIONAL**

# Social Value Certificate

## Guidance Document

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The Social Value Certificate is part of Social Value International’s Assurance and Accreditation services. These services are provided by Social Value UK on behalf of Social Value International. Contact Social Value UK at [info@socialvalueuk.org](mailto:info@socialvalueuk.org) if you have any further questions or would like to discuss an application with our team.

## Section 1

### What is the Social Value Certificate?

The Social Value Certificate looks at the systems and processes that you have in place for maximising your social value. It is not about reporting social value and it does not provide proof or a statement that the organisation or programme is creating a specific amount of social value. The Social Value Certificate is about how you are working towards maximising your value.

The Social Value Certificate can be awarded to an organisation or a specific programme or project being run by an organisation. The Social Value Certificate has three tiers, as described below:

The Three Levels of the Social Value Certificate		
Level 1	Commit	Is achieved with a commitment to implement systems and processes that are consistent with the Social Value Principles, evidenced through policy documentation.
Level 2	Implement	Is achieved with the implementation of systems and processes that are consistent with the Social Value Principles, evidenced through appropriate data collection.
Level 3	Maximise	Is achieved with the use of data to drive decisions, that are consistent with the Social Value Principles, evidenced through operational changes designed in response to data and with the specific intention to maximise the social value they can create with the resources they have available.

### About the Social Value Certificate

The Social Value Certificate has been developed by Social Value International as part of their assurance and accreditation services. The Social Value Principles form the basis for the certification. The criteria and certificates have been designed and approved by Social Value International's Reporting and Assurance Technical Committee. For more information about the governance contact us at [hello@socialvalueint.org](mailto:hello@socialvalueint.org).

### Why should I get the Social Value Certificate?

The Social Value Certificate has the following advantages:

- Proves to external stakeholders (including funders) that you are aligning to an international standard for managing your social impact and taking steps towards maximising the value that you can create.
- Provides you with a clear pathway for improving the way you are manage your social impact.

## How to Apply

1. Carefully read this Guidance Document. It contains all the information you need.
2. Read the [Terms & Conditions of Application](#). A signed copy of these must be submitted with your application.
3. Download and complete the relevant Criteria and Evidence Form from our [website](#).
4. Fill out the online application form and upload your supporting evidence.

Before you apply it is also a good idea to use our [Social Value Self Assessment Tool](#). This gives you an indication of where your systems and processes are already meeting the standards. It also has a very useful set of tips and guidance to help you improve the systems and processes you have in place.

## How much does an application for the Social Value Certificate cost?

To make an application for the Social Value Certificate you must be a member of Social Value International (or an affiliated National Network).

Membership type	Level 1	Level 2	Level 3	Seminar/ Workshops
Non-member	N/A	N/A	N/A	£150
Individual member	£500	£1000	£1500	£100
Organisational member (small)	£250	£500	£750	Free
Organisational member (medium)	£350	£750	£1000	Free
Organisational member (large)	£450	£900	£1250	Free

All prices are in GBP and are exclusive of VAT for UK applicants.

## Frequently Asked Questions:

### When can I apply for Social Value Certification?

You can apply for Social Value Certification at any time.

### How long does Social Value Certification take?

The initial results will be available approximately 3 weeks after a complete application is received.

### Can you apply for more than one Level at one time?

Yes. For example you can apply for Level Two but you will also need to apply for Level One at the same time.

## Section 2

### Criteria for Level 1—Commit

The following table sets out the evidence required for an organisation or programme to achieve Level 1 of the Social Value Certificate. Applicants must provide evidence in the form of policy documents or board approved minutes that demonstrate a commitment to each of the following points.

Principle	Commitment to
Involve stakeholders	Identify a range of stakeholders beyond the minimum of funders, board, staff, government and ‘intended beneficiary group’.
	Involve representatives from all stakeholder groups in the process of understanding and defining the outcomes that they are experiencing (using open questioning).
	Reduce the risk of biases in data collection by considering/ ensuring the number of stakeholders involved is appropriate (for the level of decision the data is supporting) and that the stakeholders are representative of the rest of the population.
Understand change	Collect information about all consequences of your activities rather than limit data collection to measuring your objectives only.
	Establish the relationship between inputs, outputs and outcomes (including unintended) for each stakeholder group.
	Identify indicators (ways of measuring) all the outcomes that need to be managed (intended and unintended).
Value the things that matter	Understand the amount of time and resources required to deliver your activities
	Understand the relative importance of the outcomes for all stakeholder groups (this could be done through ranking or weighting). Representatives of each stakeholder group should ideally be involved in this exercise or as a minimum by involved in verifying the results.
Only include what is material	Collect information about outcomes that are both relevant and significant to your operations. Significance being determined by the quantity, duration, causality and value of the outcome.

<b>Principle</b>	<b>Commitment to</b>
Do not overclaim	Understanding/estimating the approximate duration of all of the outcomes you manage.
	Calculate the impact of each outcome (for all stakeholder groups) based on some baseline data on what might have happened anyway regardless of your intervention.
	Understanding how much your intervention contributes towards the outcomes and who else contributes.
Be transparent	When reporting internally or externally be clear on the scope of your impact analysis by always stating the activities under review, the timescale of the analysis and the audience and purpose of the analysis.
Verify the results	Reviewing the results and recommendations of any impact analysis with representatives from each stakeholder group.
	Ensure that reports are reviewed internally before wider circulation.
	Seek an external review of all public facing reports. This review could be from a 'critical friend' or a more formal assurance provider.

## Criteria for Level 2—Implement

The following table sets out the evidence required for an organisation or programme to achieve Level 2 of the Social Value Certificate. Evidence must be provided to show how the organisation or programme has complied with each of the 17 points.

<b>Principle</b>	<b>Commitment to</b>	<b>Example of satisfactory evidence</b>
Involve stakeholders	Identify a range of stakeholders beyond the minimum of funders, board, staff, government and 'intended beneficiary group'.	A list of stakeholders identified including statement on the intended beneficiary group(s).
	Involve representatives from all stakeholder groups in the process of understanding and defining the outcomes that they are experiencing (using open questioning).	Minutes/document signed by board describing the process of involving stakeholders in defining the outcomes.
	Reduce the risk of biases in data collection by considering/ensuring the number of stakeholders involved is appropriate (for the level of decision the data is supporting) and that the stakeholders are representative of the rest of the population.	Minutes/document signed by board describing the process.
Understand change	Collect information about all consequences of your activities rather than limit data collection to measuring your objectives only.	A spreadsheet that shows data is being collected against a range of outcomes including a statement on which ones are your objectives.
	Establish the relationship between inputs, outputs and outcomes (including unintended) for each stakeholder group.	Minutes/document outlining these relationships.
	Identify indicators (ways of measuring) all the outcomes that need to be managed (intended and unintended).	Minutes/document outlining these indicators.
Value the things that matter	Understand the amount of time and resources required to deliver your activities	A spreadsheet outlining the time and resources required to deliver your activities.
	Understand the relative importance of the outcomes for all stakeholder groups (this could be done through ranking or weighting). Representatives of each stakeholder group should ideally be involved in this exercise or as a minimum by involved in verifying the results.	Minutes/document outlining the outcomes and relative importance.

Principle	Commitment to	Example of satisfactory evidence
Only include what is material	Collect information about outcomes that are both relevant and significant to your operations. Significance being determined by the quantity, duration, causality and value of the outcome.	A table showing how outcomes are assessed for materiality based upon quantity, duration, causality and value of each outcome.
Do not over-claim	Understanding/estimating the approximate duration of all of the outcomes you manage.	Minutes/document outlining the outcomes and approximate duration of each outcome.
	Calculate the impact of each outcome (for all stakeholder groups) based on some baseline data on what might have happened anyway regardless of your intervention.	Minutes/document outlining the baseline for deadweight on each outcome.
	Understanding how much your intervention contributes towards the outcomes and who else contributes.	Minutes/document outlining the levels of attribution each outcome.
Be transparent	When reporting internally or externally be clear on the scope of your impact analysis by always stating the activities under review, the timescale of the analysis and the audience and purpose of the analysis.	Minutes/document outlining the scope of the analysis.
Verify the results	Reviewing the results and recommendations of any impact analysis with representatives from each stakeholder group.	Minutes/document outlining how stakeholders were involved in verification.
	Ensure that reports are reviewed internally before wider circulation.	Minutes/documents outlining the internal review that has taken place.
	Seek an external review of all public facing reports. This review could be from a 'critical friend' or a more formal assurance provider.	Minutes/documents outlining the external review that has taken place.



## Criteria for Level 3—Maximise

The following table sets out the evidence required for an organisation or programme to achieve Level 3 of the Social Value Certificate. Three pieces of evidence must be provided to show how the organisation or programme has complied with each of the points.

Requirement	Evidence required (all pieces of evidence must be provided)
Regular discussion and analysis of social value data at board level and operational levels of the organisation	Provide a description or flow chart showing how social value data is used in decision making from operational to Board/trustee level.
	Minutes of board level meetings showing that social value data has been discussed regularly (ideally more than once in the last 12 months).
	Minutes of operational level meetings showing that impact data has been discussed and analysed regularly (at least quarterly intervals over the period of at least 12 months).
Impact data is being used to identify and consider areas for improvements to operations. This leads to decisions aimed at maximising the social impact of the organisation.	A table or 'proposals document' that draws on social value data to identify potential improvements to operations - proposals to maximise social value.
	Minutes of a meeting showing that a range of proposals to improve operations (based on the above document) were discussed at an operational (or board level) and decisions were made to implement at least one proposal. The minutes should also describe why any proposals to change operations were not implemented or put on hold.
	Provide a narrative example of a change to operations based on social value data. Include whether this has created additional social value or if too early to tell, how this will be measured. (Case Study)

## Appendix 1: The Principles of Social Value

1. **Involve stakeholders**—Inform what gets measured and how this is measured and valued in an account of social value by involving stakeholders.
2. **Understand what changes**—Articulate how change is created and evaluate this through evidence gathered, recognising positive and negative changes as well as those that are intended and unintended.
3. **Value the things that matter**—Making decisions about allocating resources between different options needs to recognise the values of stakeholders. Value refers to the relative importance of different outcomes. It is informed by stakeholders' preferences.
4. **Only include what is material**—Determine what information and evidence must be included in the accounts to give a true and fair picture, such that stakeholders can draw reasonable conclusions about impact.
5. **Do not over-claim**—Only claim the value that activities are responsible for creating.
6. **Be transparent**—Demonstrate the basis on which the analysis may be considered accurate and honest, and show that it will be reported to and discussed with stakeholders.
7. **Verify the result**—ensure appropriate independent audit.

## Appendix 2: The Social Value Self-Assessment Tool

The [Social Value Self Assessment Tool](#) is designed to help users judge how well they are measuring and reporting on their social value, in line with the Principles of Social Value.

It was created in collaboration with our members Hall Aitken.

The tool is comprised of a seven stage questionnaire, showing results as a spider chart illustrating areas of strength and areas for improvement.

By using the Self Assessment Tool you can:

- Fully explore the benefits of the Social Value Principles
- Get advice on what to do next
- Get an accurate baseline of how good your social value measurement practices are
- High scoring users can then use their score to guide them towards applying for assurance and accreditation.
- Judge your readiness for Social Value Certificate application

The tool provides guidance, support and more advice to people who want to improve the way in which their organisation measures their social value and assesses their service delivery but don't know where to start. To access the tool, users can create an account and sign up for free [here](#).



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