



Centre for Citizenship  
Enterprise and Governance

# SOCIAL VALUE IN PUBLIC PROCUREMENT

2014 PATHFINDER PROJECT  
FOR PUBLIC, PRIVATE, THIRD  
AND COMMUNITY SECTORS

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## Social Value Consulting Services to the UK Public Sector Organisations

Date

October 1, 2014

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This report is a redaction of multi-disciplinary contributions from various sources all of whom are acknowledged. Whilst there is a central theme, readers may detect a variety of styles and approaches which add to the richness of the conclusions. Responsibility for issuing the report is taken by the Centre for Citizenship, Enterprise and Governance (CEEG is part of the University of Northampton Business School). We are grateful to the UK Social Value Portal for their assistance under which this report is shared under a Creative Commons 4.0 license (Attribution-Non-Commercial-No Derivatives 4.0 International CC BY-NC-ND 4.0) details of which are available from CCEG. The report was based on realistic figures from real life examples in the West Midlands. Non-public information has been removed to allow other public sector organisations to learn from the findings of this report.

## Executive Summary

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### WHAT GETS MEASURED GETS DONE

This report proposes a system to transform public procurement in the UK so that it delivers many millions of pounds of social value. We can, for the first time, give companies and social enterprises a built-in incentive to provide social value, not just once but in an ongoing competitive race to outdo each other. In the public services we can have a race to the top, instead of a race to the bottom.

This report is the work of the Centre for Citizenship Enterprise and Governance by a large interdisciplinary team with sections covering the relevant legislative, industry and procurement frameworks. It is not an academic research paper but concludes with a proposal for a pragmatic solution, which can be made available to all suitable public sector organisations within 6 months.

#### ALL CONTRACTS WON ON SOCIAL VALUE

The climate for public sector organisations could not be more difficult. Increasing non-statutory social costs set against rapidly decreasing budgets have led to crisis. Most western economies, including the UK, still face many years of pressure on public spending. Governments are increasingly looking for ‘blended solutions’ – bringing together the public, private and third sectors to make limited public funds go further. Such blended solutions are not easy to make work.

The Public Services (Social Value) Act 2012 (SVA) offers a tool which public sector bodies can use to create these blended solutions but it has not yet lived up to its promise. Under the SVA public sector organisations such as Local Authorities can consider ‘social value’ as a criterion when awarding tenders for services – for example awarding 10% of the marks. Awarding 10-20% of the marks for a tender on social value may sound a small amount, but if the margin of winning contracts is usually less than 10-20% this means that all contracts will be won or lost on social value. ‘What gets measured gets done’ and if companies need to add social value to win contracts then that is what they will do. But what does taking social value into account mean? How can the criteria be set in a way that complies with EU procurement rules? How can it be measured and assessed by overstretched procurement teams, who lack the time and experience to pick their way through claims of social value?

Then there is a problem of scalability. Most public bodies have very large numbers of suppliers. A standard consultancy led manual social impact tool is too costly, too cumbersome and resource intensive. So when used social value criteria are used at all, they are often assessed simply by a slick presentation and written submission, which probably tends to favour the larger organisations than a small passionate social enterprise. It becomes a tick-boxing exercise rather than a means of measuring real commitments and using the power of competition to drive more and more social value.

We believe the missing element has been a robust, objective, legally compliant, marking and assessment system for public procurement tenders. The portal we are proposing in this paper will resolve this issue. It is fully financially modelled, achievable, and can be delivered within 6 months at no/minimal cost to the public organisations using it. Importantly, it can scale to measure the many thousands of supplies used the larger public sector organisations.

## **HAVING YOUR CAKE AND EATING IT**

This report has been prepared particularly with Local Authorities in mind as they face severe funding pressure while being expected to deliver a huge range of services. This will help them have their cake and to eat it too – to comply with SVA, to deliver significant resources into non-statutory responsibilities (and thus to relieve the delivery pressure), to create and educate all organisations with their areas on socially responsible business, to cover all costs associated with the initiatives but also to generate income for the Local Authorities to develop their social ambitions. Other public sectors will have their own challenges and opportunities. We have mapped out a low risk and a low cost measured pathway to ensure these ambitions can be achieved and have given detailed guidance on best practice in community engagement drawing on historical implementations of very similar roll-outs.

## **THE KEY THAT UNLOCKS THE POTENTIAL**

The portal we are proposing would enable any public sector organisation to effectively and safely set criteria for social value in their tenders and have bidders' performance against these criteria assessed. It is this objective measurement, made possible by the correct social value metric that can be fully automated, that unlocks the potential of the SVA. Under the system:

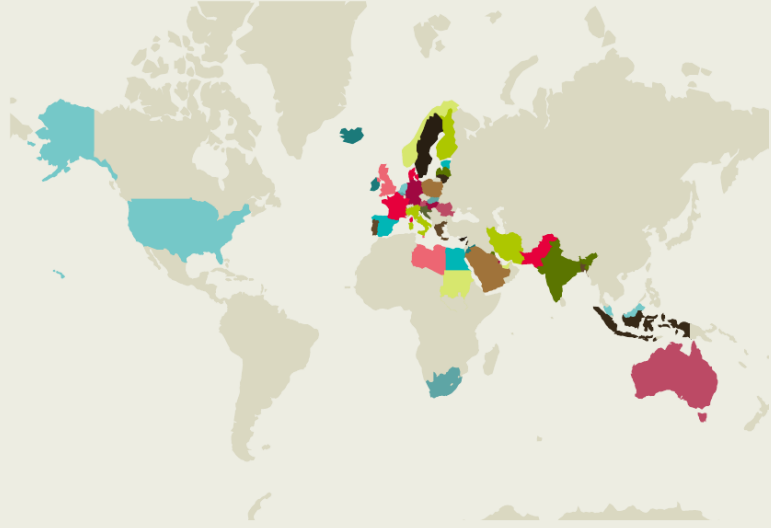
- The organisation can set either general social value criteria or set specific criteria for particular tenders, with our guidance on how to comply with EU procurement rules
- By using criteria that specify the 'local' social value added, organisations can legitimately give local firms a chance to do better than bigger (inter)national firms, and deliver to the UK £100m's of social value annually.
- Bidders submit information on their 'social value add' to the portal. This information is independently verified and assessed against the council's criteria.
- There is no cost to the public sector organisation. It will be funded by a 1% levy on the winning contractor to cover cost of independent social impact analysis and monitoring contract compliance across the period against Social Value Act and under the Best Value obligation
- A further optional 1% raised will go into a fund to support social value projects chosen by the public sector organisation and provide training for bidders, including local social enterprises, to maximise their social value add - raising millions of pounds of funding on top of the social value benefits.
- The system funds capacity development across the public, private, third, and community sectors in CSR and social value provision
- Stress testing the financials leads us to conclude the system has guaranteed sustainability and scalability to be adopted by other public sector organisations

## **CONCLUSION**

This report is not a talking forum, a discussion point, or an academic study. It is an eminently practical 'what, how, when' report with an implementation goal of April 2015 launch for the first public sector organisation, and 30 days for subsequent organisations. The findings utilise the most current and rapidly adopted methodologies in the world now in practice across 5 continents, have been risk assessed, with numerous pilots carried out in the UK. We value your feedback to our collective understanding of creating social value, and hope we are able to engage everyone in providing an agreed solution. We would welcome a dialogue with other organisations.

## Pathfinder Project

Measurable social value has become a global phenomena ranging from c. 2% cash 'levy' in countries like India to Indonesia, and many Islamic governments at 2.5% ... through to 20% social inclusion ring fencing of funds in EU and 30% 'tax' in Australia for exploitation of non-renewable resources. The UK is part of a global movement in developing a social value strategy which is driven by legislation and procurement.



## FRAMEWORKS

Applicable to how you implement social value locally are a host of National, European and International legislative, social innovation industry and procurement frameworks that directly impinge upon key decisions. The most relevant of these are:

<b>Legislation</b>
<b>EU: GECES Social Impact Measurement - June 2014</b>
<b>EU: Non-Financial Info Disclosure for &gt;500 employees- April 2014</b>
<b>UK: Social Value Act - public procurement PQQ/ITT - Jan 2013</b>
<b>UK: Localism Act - November 2011</b>
<b>UK: Sustainable Communities Act 2007</b>
<b>UK : Local Government Act 'Best Value' - 1999</b>
<b>UK: Directive 92/50 EEC Horizontal Policies for Procurement - 1992</b>
<b>Major Trends</b>
<b>INDIA: 2% CSR Law - 2% gross profits targeting CSR - April 2014</b>
<b>USA: WEF Stock Market Listings reporting proposal - March 2014</b>
<b>INDONESIA: BUMN Law 2% on profits for CSR</b>
<b>Industry Bodies</b>
<b>Global Reporting Initiative (GRI-4)</b>
<b>International Integrated Reporting Council (IIRC)</b>
<b>Benefits Corporation</b>
<b>ISO26000 Social Responsibility - 2010</b>

# Rules of implementation

The main conclusions we have reached from our extensive research of these frameworks are as follows

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**SOCIAL IMPACT METRIC:** you have to be prepared to accept virtually all relevant submissions, whether empirical data or analysis reports, and your implementation must measure community sentiment and translate to your KPI's

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**HYPERLOCALITY:** you cannot discriminate towards local suppliers by virtue of geography, but you can by virtue of local impact, and you should have a methodology to take into account social impacts that lie outside your region

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**DECISIONS:** to avoid legal challenges separate decision and measurement authorities, both of whom must remain neutral and the latter able to monitor for the entire length of the contractual obligation and able to arbitrate

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**TARGETS:** the most used targets are the creation of 20% maximum social value and achieving a minimum of 2% financial contribution, but neither can be yes/no gates

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**CAPACITY DEVELOPMENT:** educating the public, private, third and community sectors is the key to successful implementation to ensure they can meet this agenda

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**CITIZENSHIP:** multi-stakeholder best practice across public, private, third and community sectors is via face-to-face engagement but scaled through digital platforms

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# SOCIAL IMPACT

The challenges of measuring social impact are the same whether at the global scale or locally. There are too many organisations to measure, a plethora of differing social impact metrics, not enough expertise and these are too costly to achieve those goals using traditional techniques.

**▲ 1,000,000,000 +**

Organisations in the world across public, private, third and community sectors

**● 1000 +**

Social Impact Metrics in the world

**👤 250,000,000 +**

Consultants required to audit annually if using primary research

**★ UK£ 3,000,000,000 +**

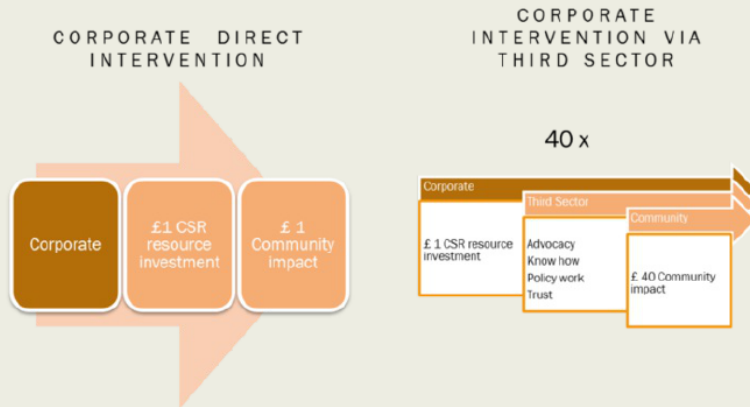
Yearly cost of social impact analysis

First you have to be able to identify every stakeholder. Current methodology use the citizenship map approach



Next you have to measure the social impact of the organisation themselves, as well as the target area they are (or will be) working within, forecast what will be the social impact of that delivery as well as the multiplier effect of going through NGO agencies

# Choice considerations



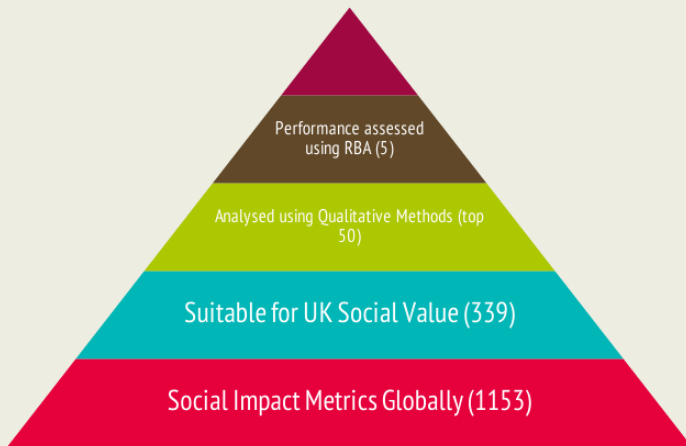
In choosing the methodology or impact tool to undertake this you have to take into account a plethora of factors that make one metric more suitable than the other to you



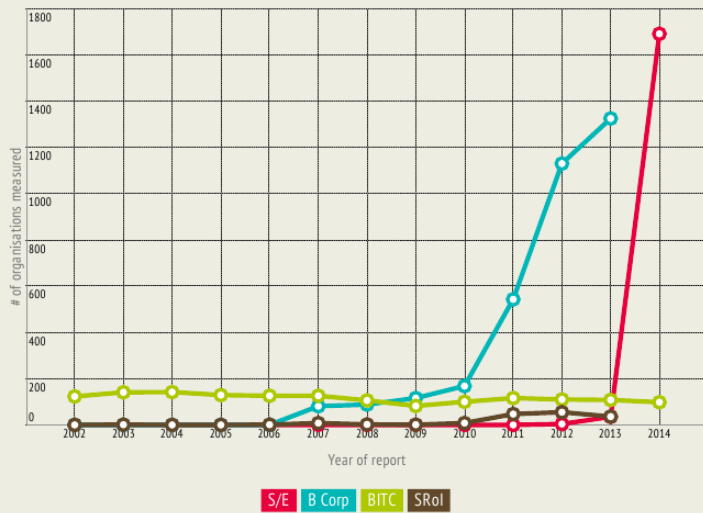
Given the scarce resources available to public sector organisations and to SME/Micro businesses, a key driver is to understand the resources, effort and time it will require to undertake this task. We consider these figures to be reasonable targets

	Analyst Entry	Org Entry	No Entry	Time
Manual	Y			2 hours
Online		Y		15 mins
Cloud			Y	10 secs

There are no bad metrics as they were all developed for a reason. The report has beauty paraded 1153 social impact metrics and through a series of criteria identified the top 5 for the UK



Using Results Based Accountability (RBA) we have analysed the top 5 to arrive at the most suitable metric to meet the criteria

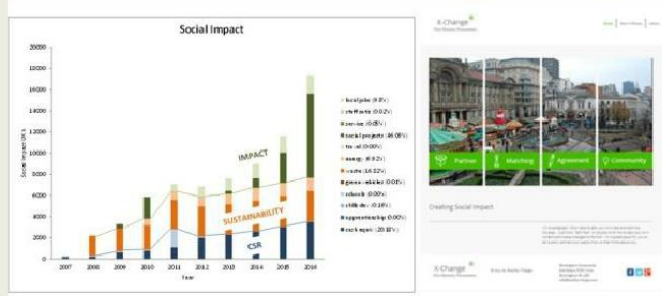


The Social Earnings Ratio, S/E, has been tested as an overarching translator metric as well as dealing with empirical data from organisations.



# Pilots in 2014

In UK, measurement of social impact is being used to award contracts as fulfillment of Social Value Act 2012. The methodology described in this report has the distinction of being used in the first public sector contract awarded since launch of SVA2012 - SCAPE (UK£ 385m) was determined in February 2013. Since then, it has been used in a number of other implementations including, most germane to this report, the Birmingham Market-X-Change pilot in February 2014 in the areas of Balsall Heath, Castle Vale and Shard End conducted by a consortium of Aston University, Birmingham University and Birmingham City University under the umbrella of the Centre for Citizenship, Enterprise and Governance (CCEG).



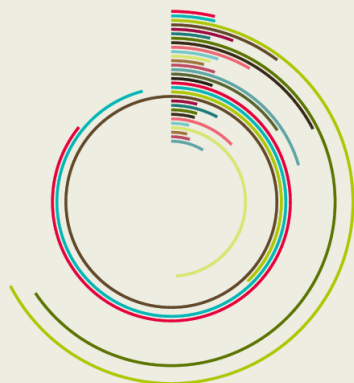
The Birmingham pilot demonstrated the capability of the methodology to rank social value performance and articulate it in simple values, including a one-number god-like metric for benchmarking

	Efficiency of CSR (S/E)	Social Impact as % of size (capitalization)	Social Impact created	Environmental Impact	People Impact	Cash Impact	Pay Disparity	Tax Avoidance	Popularity
Birmingham Royal Ballet		●			●				
Co-Operative Group				●					●
Investec						●			
Jaguar								●	
John Lewis Partnership							●		
RBS			●						
Unilever	●								

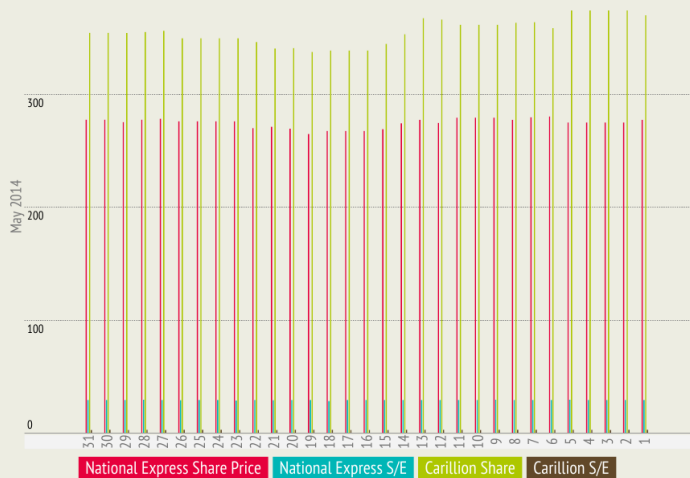
Results can automatically map on an interactive Google Earth GIS to start looking at correlations between social value, economic value, financial value, unemployment, deprivation, health outcomes, etc through Big Data analysis. A number of other uses are currently being explored in the city eg. provenance of local products and services



Our methodology is also being used in the 'Birmingham 100' ranking league table which celebrates the good work being carried out in the city



The S/E Ratio is also being used to evaluate the professional services sector in the city along Colmore Row (Business Investment District), as well looking at the performance of listed companies in the area in real time mapping of their financial value (share price) against their social value every 10 seconds



## THE BUSINESS CASE

Public Sector organisations have a large number of organisations registered on their supplier portal. Many local authorities, are struggling to deliver non-statutory services - parks, libraries, leisure centres, arts, voluntary organisations, charities, mental health units, community centres, health centres, etc. These latter services are under threat due to funding shortages within the public sector. Social Value can be used to bring resources to these non-statutory services in a significant transformation of the landscape in the city. Any implementation of social value has to be conducted in scale to have any effect. The basic paradigm is the matching of private sector agendas and resources to third sector organisations to empower the community and lift the heavy burden off public sector organisations

Rank benchmarking

# Capacity development



NGO's Can Multiply Co SI

The key deliverable of the public sector portal will be the capacity development of all organisations within the city across all sectors which will be funded by the social value portal implementation. Scale is achieved not only through mentoring, meetings, conferences, etc but also through the delivery of certificated courses, an existing online MOOC (Massive Open Online Courses) in social innovation, leadership development, etc with a blend of traditional and digital learning



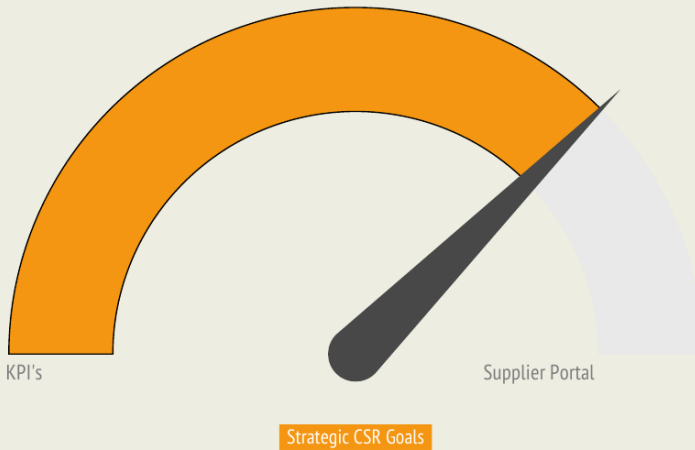
we have reports detailing the IT platform that will carry out all measurements of social value, match it against KPI's, and report it back to both the public sector organisation and the organisation being measured.



Through a mechanism of charging a suggested 2% levy to successful bidders, and UK£ 5 per measurement for other organisations (compared to c. UK£ 3-5000 per company for traditional social impact measurement systems), the results are very encouraging.

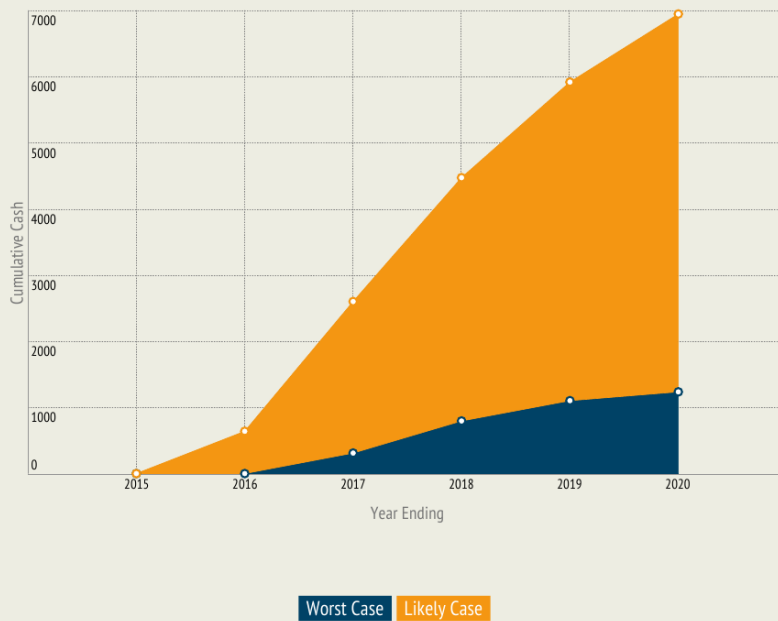
**A one-off integration investment of UK£5-50k (only if required) with no further funding for the lifetime of the contract; this can be amortised**

**It will deliver 20% social value at a cost of 4.65 pence per tax payer ie 2000 x RoI to the citizen**



**Strategic Goals will be delivered across the region to private, public, third sectors targeting 75% enrollment within 5 years at no cost to the public sector organisation**

**The public sector organisation will receive recurring revenue to re-invest in Social Value initiatives giving 100 x Rol**



**Organisations will take a leading exemplar role on an international stage**

# UK ROLL OUT

▼ **5,000,000**

UK£ 5+ m investment at no risk to the public sector

▲ **5**

Public sector organisations required for optimum scalability

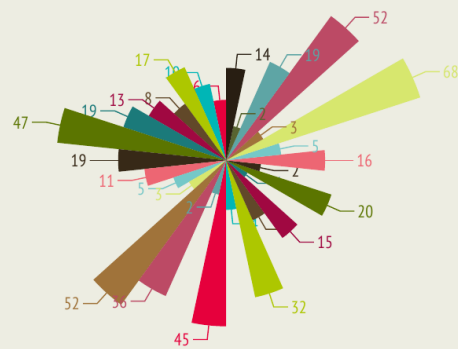
The system is capable of Real-Time-Information (RTI) and has been designed for roll out across other public sector organisations throughout the UK and Europe. The architecture is that of a scalable implementation of an enterprise class platform as used in other large public sector roll outs such as Universal Credits and Tell-Us-Once with valuable lessons learnt from the Welfare Reform's Under-Occupancy engagement. Using a formula of 4.65p/citizen public sector organisations will be able to access the same platform at c. UK£ 15-50k one off cost which can be amortised



*"The World's Most Rapidly Adopted Social Metric"*

*S/E Ratio - Vatican Press (July 2014)*

By using a universal metric that has widespread adoption allows cross-sector organisations to explore other options as the data mining marketplace grows in big data sharing between organisations both nationally and internationally



- Bidding
- Value of Arts
- Procurement
- Branding
- Regional targeting
- Human Rights
- Impact investment
- Risk Management
- Grant awards
- Health & Wellbeing
- CSR reporting
- International Development
- Consumer behaviour
- Data mining
- Job market
- Logistics
- Component supply
- Consultancy
- Provenance
- Ethical investments
- Needs assessment
- Management dashboard
- Benchmarking
- Funding 3rd sector
- Reputation strategy
- Ethical advisory
- Curation marketplaces
- Hyperlocality
- Sector ranking leagues
- SIB

**We are seeking 5 pathfinders organisations of varying sizes to share in the delivery of social value outputs to their service users for April 2015 launch**

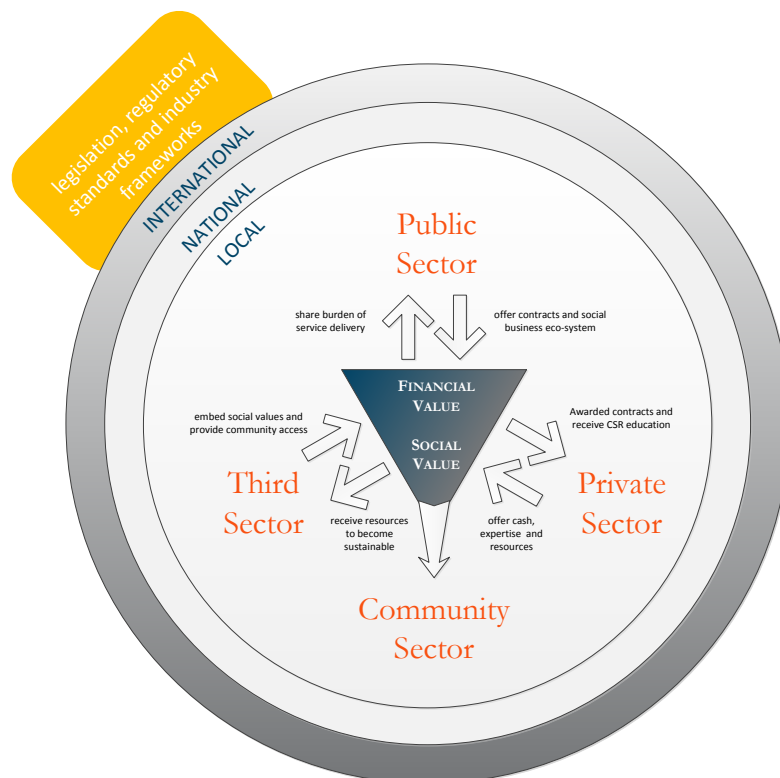


# 1 The Blended Model

In the past six years there has been a seismic shift in the social innovation industry stemming from the financial crisis of 2008. Before the crisis things were best described as adequate with the Private Sector enjoying a burgeoning period with company stock market listings at an all-time high. The Public Sector benefited from taxes on increasing company profits, and the Third Sector<sup>1</sup> enjoyed Lottery money – a fairly recent addition to their funding. The community was the recipient from all this. Since the crash, however, no sector has adequate resources forcing us to become reliant on each other to survive and to develop new blended solutions to meet the challenges of society.

**i** *The blended model describes our current imperative all round the world that as Public Sector funds recede, we are increasingly turning to the Private Sector to deliver our community services through Third Sector agencies. Easy to articulate, but extremely difficult to do.*

To encourage blended solutions governments all over the world have created frameworks and legislation to try to ensure the needs of people are met despite what at times appears unsurmountable and unpredictable problems at local, national and international levels most of which we cannot control. What it has created in the middle is a need to articulate financial and social value using a common language. The problem is that whilst financial value is a mature and well defined concept, we have yet to arrive at a common language and definition of social value. Indeed, not only is there not a robust consensus on social value between the three sectors, there is not even consensus within a sector.



<sup>1</sup> The Third Sector describes the space taken up by voluntary organisations, charities, not-for-profits, and some Community Interest Companies (CIC) and Social Enterprises.

The inherent complexity of social value instruments does not stop there. With the rapid escalation of legislation, procurement directives and industry frameworks – 5 since March 2014 alone (UK, EU, India, USA), the conflicting advice and structures between local, national and international initiatives, means that dependent procurement decisions are increasingly leading to significant litigation. Typically procurement metrics within the usual PQQ/ITT<sup>2</sup> process usually have less than 5% difference between success and failure, but social value structures are typically asking to demonstrate 10-20% social impact in contract value (20% being the EU/UK goals<sup>3</sup>, larger in Wales), so the importance of getting proper processes right cannot be underestimated.

All this within a backdrop of decreasing available resources to the public sector but increasing commitment to promote ‘good’ businesses often linked to the complexity of attendant ‘*difficult to do*’ agendas such as health, well-being, education, poverty, deprivation, unemployment, crime, etc. With some local authorities preparing for a very significant reduction in staffing whilst simultaneously aiming to expand CSR values across their localities the potential problems are evident. In effect procurement departments aim to target the tens of thousands of varying sized businesses registered on their digital tendering platforms or procurement portals in a manner which is both transparent and efficient; this means inevitably scalability of existing approaches is a severe bottleneck. Not only measuring but also monitoring social value performance puts an onerous burden on the public sector and SME<sup>4</sup>/micro businesses. This is worsened by the use of *not-for-fit* purpose social impact analysis techniques which are usually expensive, overly complex, slow, resource intensive, subjective, easily challenged, difficult to articulate and niche; shockingly there are over 1150 social impact metric techniques internationally so creating a bewildering choice for the naïve operator.



*Practices that are likely to end you in expensive litigation include ignoring extensive EU and UK legislation, positive discrimination for local suppliers, the use of conflicted corporate advisory services to determine procurement, use of metrics outside industry standards, sampling of monitoring performance, failing to take into account social value performance outside your region. Ignorance is no defence in court.*

To get around such hurdles public sector organisations have come up with some interesting but questionable solutions. The usual outsourcing the responsibility to the corporate professional advisory industry is, of course, illegal due to the conflict of interest; the poacher cannot become the gamekeeper unless it disowns the clients which they are also measuring. In frustration some have developed their own metric, ignoring the industry standards that have been developed by professionals over years of research and refinement; naturally they are incomplete and fail to conform to the plethora of global industry frameworks. Unfortunately the sector is also often counter intuitive falling foul of broader EU regulations that mean you cannot give preference to local suppliers. Even selected sampling for monitoring contracts is discriminatory.

This report is not just fact finding, not only about best practice and neither simply researching what acceptable would look like. It not only sets out the details of the issues, but provides pragmatic solutions that can be readily implemented within the normal operating operandi of public sector organisations. It is not academic research but sits within an agnostic, non-agenda, non-partisan university approach with significant advisory across all sectors.. This is a developing understanding of the space and thus it is not perfect but it is comprehensive. We have given what is legal, compliant with national and international frameworks, the choices available, how to compare apples with oranges in social value, best way to implement and how to avoid significant costs.

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<sup>2</sup> Pre-Qualified Questionnaire (PQQ) and Invitation to Tender (ITT)

<sup>3</sup> Minimum of 20% of ESF funding to LEPs is ring fenced from ESIF/EDFT to deliver social inclusion and eradicating poverty

<sup>4</sup> Small to Medium Sized Enterprises

## 27 Authors and Advisors

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The Centre for Citizenship, Enterprise and Governance is grateful to the support and contributions from the following people.<sup>5</sup>

<b>ACADEMIC</b>	<b>PUBLIC</b>	<b>THIRD</b>	<b>PRIVATE</b>
Sajin Abdu	Prof Christine Bamford	Guy Battle	Joel Blake
Paul Adams	Laura Choake	Tony Clabbe	David Cunningham
Simon Blake	Brett Crabtree	Estella Edwards	Charlie Helps
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<sup>5</sup> Some of the views expressed in this report are personal contributions and may not necessarily convey the organisations they represent. As a report – those City Councils, Public Body, Public Sector Organisation or Local Authority members have no obligation to accept or adhere to any of the advice given.

<sup>6</sup> Redacted for sensitivity

## 28 Access to More Information

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### 28.1 Case Study

- Infogram of report <http://ow.ly/Bsr9Y>
- Intro video (part 1) <http://ow.ly/BALSM>
- Intro video (part 2) <http://ow.ly/BqrbK>
- Implementation <http://ow.ly/Bgx2d>
- Case Study pilot <http://ow.ly/Bgxpj>
- An exemplar support agent [www.cultiv8solutions.com](http://www.cultiv8solutions.com)

### 28.2 Social Earnings Ratio

- Prezi introduction <http://ow.ly/BgvR9>
- Timeglider history <http://ow.ly/Bgw1S>
- Online course <http://cceg.edcastcloud.com>
- Jorum <http://ow.ly/BgzZU>
- Application 2% Law India <http://ow.ly/BgAOc>

### 28.3 Further Support

- Consumer brands [www.brandanomics.com](http://www.brandanomics.com)
- Public sector [www.bigredsquare.com](http://www.bigredsquare.com)
- Listed companies [www.sii2000.org](http://www.sii2000.org)
- Social Value Portal [www.socialvalueportal.com](http://www.socialvalueportal.com)

### 28.4 Related Media

- Vatican Video <http://ow.ly/BgAwB>
- Vatican Interview <http://ow.ly/BgACg>
- Vatican coverage <http://ow.ly/BgB1J>
- House of Lords <http://ow.ly/BgBqT>
- Institute of Financial Services <http://ow.ly/BgBI6>
- London Guildhall <http://ow.ly/BgBQK>
- The Dorchester <http://ow.ly/BgCmD>

## 29 Contact

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