



# An evaluation of Social Value Cymru

A Lottery funded project

Measuring and Managing Social Value  
How can social value unlock the potential of the legislative priorities in Wales?



Yn cefnogi grwpiau gwirfoddol a chymunedol  
Supporting voluntary and community groups



It gives me great pleasure to see how the work of measuring social value has now taken hold not only in Gwynedd but across North Wales. I feel immensely proud that Mantell Gwynedd, with the support of Social Value UK, has led on this important work.

The third sector, without doubt, has a key role to play in the delivery of services but it has not always been good at measuring or demonstrating its value in a consistent and coherent fashion. By introducing the sector to the concept of measuring social value it has provided the machinery for a simple and consistent means to measure the value of services.

I wish to express my thanks to the Lottery for supporting this work, firstly through the Improving Futures UK Fund and latterly through Wales Third Sector Skills Fund. This funding has enabled us to embed the principles of social value in our work and share those principles and skills with other County Voluntary Councils and third sector organisations across North Wales.

I feel hugely proud that Mantell Gwynedd was responsible for the first Bilingual Accredited Social Value Practitioner in the UK and, as if that was not enough, we also became the first umbrella body in the UK to achieve Social Value Organisational Status for embedding social value in all of our work.

We are now able to measure all of our achievements against Wales legislative priorities and continue to make the vital link between social value and those important legislative priorities.

My thanks to Wales Lottery, Social Value UK, all of our partners, and the entire team at Mantell Gwynedd who have enabled this to happen.

**Bethan Russell Williams**  
Chief Officer  
Mantell Gwynedd



Social Value UK is the national chapter of Social Value International, a global movement to change the way the world accounts for value. We are a professional body working with members across all sectors to improve the accounting, measurement and maximising of social value. Our work is based upon the Principles of Social Value and we aim to amplify the voices of those with little or no power. We believe in a world where a broader definition of value will change decision making and ultimately decrease inequality and environmental degradation.

A growing number of private, public and third sector organisations are recognising the need to change how we account for social value, and the key to doing this is the use of social value measurement to manage, and ultimately maximise the social value we create. This report demonstrates how organisations were able to work with Social Value Cymru to gain further understanding of their impact, but also how the

data can help them to create more informed changes and helped them with their strategic planning.

Mantell Gwynedd have been members of SVUK since 2014 and we are delighted to see how Social Value Cymru has grown over the years and how this innovative project across North Wales has developed. Wales has some of the most pioneering legislation in the world, and this creates the potential to change the way decisions are made. This project worked closely with organisations to measure wellbeing and ensure that decisions are made that create value for all stakeholders.

**Ben Carpenter**  
CEO  
Social Value UK



## Background

Mantell Gwynedd is a registered charity and company limited by guarantee. It is also the local County Voluntary Council in Gwynedd.

Mantell Gwynedd started its journey with social value in 2014 with the aim of getting a better understanding of the social value that was created through its own projects. As an umbrella organisation, Mantell Gwynedd receives core funding from Welsh Government to deliver on four key pillars of work. These pillars are Good Governance, Sustainable Funding, Volunteering and Engagement & Influencing. It was apparent that social value is an integral part of all of these key areas and Social Value Cymru was initially established to enable Mantell

Gwynedd to measure and manage its own social value.

Social Value Cymru provides social value support, advice and consultancy services to third sector organisations across Gwynedd and beyond.

We know that by working with stakeholders we are able to understand how activities create impacts on people's lives and organisations.

Employing the Principles of Social Value means that we can value these impacts, and by doing this we have helped organisations to better understand, communicate and manage the social value of their work.

## The project

Initially, Social Value Cymru was established through the support of the Improving Futures Big Lottery Fund UK. Following the success of this pilot, Mantell Gwynedd received further funding through Third Sector Skills fund, Big Lottery, and an innovative partnership was established between the five other County Voluntary Councils in North Wales, with Mantell Gwynedd sharing their learning on social value measurement to date.

As support organisations for the third sector in North Wales, CVCs are the best placed bodies to enable organisations to demonstrate and communicate their impact on communities.

### The four key intended outcomes for the Social Value Cymru Lottery funded project were:

- To upskill CVCs to offer support to organisation to measure social value
- To support providers who deliver services in North Wales to embed social value measurement into their organisations
- To upskill trustees to use this social impact information to inform their decision making thus allowing them to manage social impact
- To develop a support network in North Wales to develop a stronger third sector in North Wales with a greater focus on public service delivery and able to link services to legislative.

# Social Value

People might interpret the idea of social value differently, but at its core it is about understanding

- a) what has changed in someone's life as a result of particular activities and
- b) valuing those changes.

Based on 7 the principles of social value (see below), social value allows us to discuss the outcomes of our work in the same language as the costs of producing them. By asking people about how they value changes in their well-being, decision makers have more complete information about the important effects of their decisions, and the relative worth of different outcomes to a range of stakeholders. This information creates a discussion that meaningfully includes evidence on the relative value of changes in well-being, in-line with general financial accounting principles that means the information is good enough to make a better decision. Importantly, it does not always mean that we must employ techniques with high scientific-rigour; but what it ultimately does is increase the likelihood of making decisions that have the greatest possible positive impact, within the limits of the resources available.

## The 7 Principles of Social Value are;

1. Involve stakeholders;
2. Understand what changes;
3. Value the things that matter;
4. Only include what is material;
5. Do not over-claim;
6. Be transparent;
7. Verify the result.

Further detail on the Principles is available from Social Value UK, but what is hopefully clear are the similarities to the requirements for the legislation in Wales.

## Social Value and the legislative framework in Wales

The legislative framework in Wales requires all sectors to work differently, with citizen's needs at the centre of decision making. The key principles and values of some of the key legislation and strategies in Wales are seen in the table below:

Social Services and Well-being (Wales) Act 2014	Well-being of Future Generations (Wales) Act 2015	Healthier Wales values
<ul style="list-style-type: none"> <li>• Voice and Control</li> <li>• Prevention and early Intervention</li> <li>• Well-being</li> <li>• Co-production</li> </ul>	<ul style="list-style-type: none"> <li>• Longer term</li> <li>• Integration</li> <li>• Involvement</li> <li>• Collaboration</li> <li>• Prevention</li> </ul>	<ul style="list-style-type: none"> <li>• Co-ordinating health and social care service seamlessly</li> <li>• Measuring the health and well-being outcomes that matter to people</li> <li>• Proactively supporting people</li> <li>• Driving transformative change</li> <li>• Promoting the distinctive values and cultures of the whole Welsh system</li> </ul>

<http://www.socialvalueuk.org/why-social-value/the-principles-of-social-value/>

Social value at its core means what has changed as a result of activities and the value of those changes. These are changes in people's lives but also changes for other stakeholders as a result. For example, a Community Link worker might support an individual to re-engage with the community, they can become less isolated and over time and could identify mental and physical well-being improvements. It is likely that these changes will also prevent the need for other statutory interventions in the future by the Health Board or by the Local Authority. Changes such as reduced GP visits could also be measured. By measuring and managing social value we can truly turn the elements of the legislation in Wales into reality.

Principle number one of social value is to involve stakeholders, and this should be done throughout the process of measuring social value. When an organisation measures and manages their social value, that process is not possible without allowing beneficiaries / clients to have **voice, control and involvement**. Only through engaging with stakeholders can we understand what has changed (positive and negative) and how important those changes are. This is aligned with the first principle of co-production which is to 'value all participants and build on their strength'. Allowing service users to tell us their stories is empowering and allows them to feedback on their experiences, allowing us to learn and develop from what worked well, but also what could be better.

Valuation is where social value and SROI differs from other measurement tools,

"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." SVUK

<https://copronet.wales/>

This can be done using monetisation but does not have to be. What this means in terms of the Social Services and Well-being (Wales) Act 2014 and co-production is measuring and managing '**what matters**' for the people we are working with in terms of their **well-being**. We all value things, and we will value things differently depending on our life situation, and this insight can truly help us to understand what is most important for people, and how we can prioritise services to address the problem.

When we've measured social value, we need verification which means going back to our stakeholders to ask if the story has been captured correctly. When we're clear about what our outcomes are as an organisation, or what our services should focus on, we can start to embed impact management to help aid decision making, hopefully improving and maximising the social value created for people.

The infrastructure that has been established over several years means that all decisions are driven by our financial budgets and output targets. Even socially driven organisations are often saddled by short term funded projects which does not allow them the time or the information to do things differently for those who matter the most to them. As a Manager, Trustee / Director or Commissioner by embedding social value principles we can share power by allowing our strategic direction to be influenced by what our stakeholders say is most valuable and then 'people can be change makers'.

# The project – the organisations

The aim was to support 30 third sector organisations across North Wales, five in each county. Following an application process, 28 organisations were successful and were invited to be part of the project and receive support to embed social value into their organisation over two years. Social Value Cymru aimed to ensure a variety of organisations participated in the project. The 28 organisation included National, regional and local organisations and also looked at a cross section of services including mental health, children and young people, learning and physical disabilities, older people, community projects, domestic and sexual abuse, the arts, employment programmes, and the Welsh language.

## The support included:

- Training for staff members and the Social Value Champion on the Board of Trustees
- Mentoring and consultancy
- Building their own social value report on one of their activities
- Supporting the adoption of a framework to manage their social impact.

## 25 organisations received support, these included:

- The Outdoor Partnership
- Anheddau Cyf
- Tan y Maen
- Abbey Road
- Stepping Stones
- Kaleidoscope North Wales
- Cwmni Frân Wen
- Tyddyn Môn
- Book of You CIC
- Citizens Advice Denbighshire
- South Denbighshire Community Partnership
- Creating Enterprise
- CAIS
- Creatasmile
- North Wales Housing Association
- BAWSO
- Advance Brighter Futures
- Erlas Victorian Walled Garden
- Dynamic
- Empower – Be the Change
- Dangerpoint
- Menter Iaith Wrecsam a Flint
- KIM inspire
- Care and Repair Flintshire

Unfortunately, three organisations withdrew from the project for various reasons.

Case studies are available on the Mantell Gwynedd website and below are some examples:

## The Outdoor Partnership



The project helped them to measure the impact of their Pathway to Employment programme. This programme is aimed at supporting people in North Wales who are either experiencing the outdoors for the first time or are interested in developing their personal and / or professional skills leading to a more active lifestyle, volunteering and employment.

The report received support with the Measure and Manage Guidebook and a programme to manage their impact by Social Value Cymru. Many of the staff members have received training on managing social impact and they are now embedding these measurements across all their projects. The Social Value Champion on their Board of Directors was involved with this work from the beginning to ensure a buy in from the organisation on all levels.

*“The Outdoor Partnership improves opportunities for more people in Wales to achieve their potential through outdoor activities. We can see the difference our projects have made to so many people, but it is difficult to demonstrate positive outcomes o our funding partners and stakeholders. Being part of this SROI project will help us to how our key stakeholders their return on their Investment as well as helping us make internal decisions on service improvements and future strategic direction.”*

Tracey Evans, Chief Executive Officer.

## Empower – Be The Change



A social enterprise based in Wrexham delivering programmes and services across North Wales. The SVC team worked with the organisation to measure the impact of The Empowerment Programme and embed systems to measure the impact of their services. The programme supports individuals to build their mental resilience and their confidence to ensure that they become empowered to make decisions in their lives, both in their personal life but also within their working environment or training / education environment.

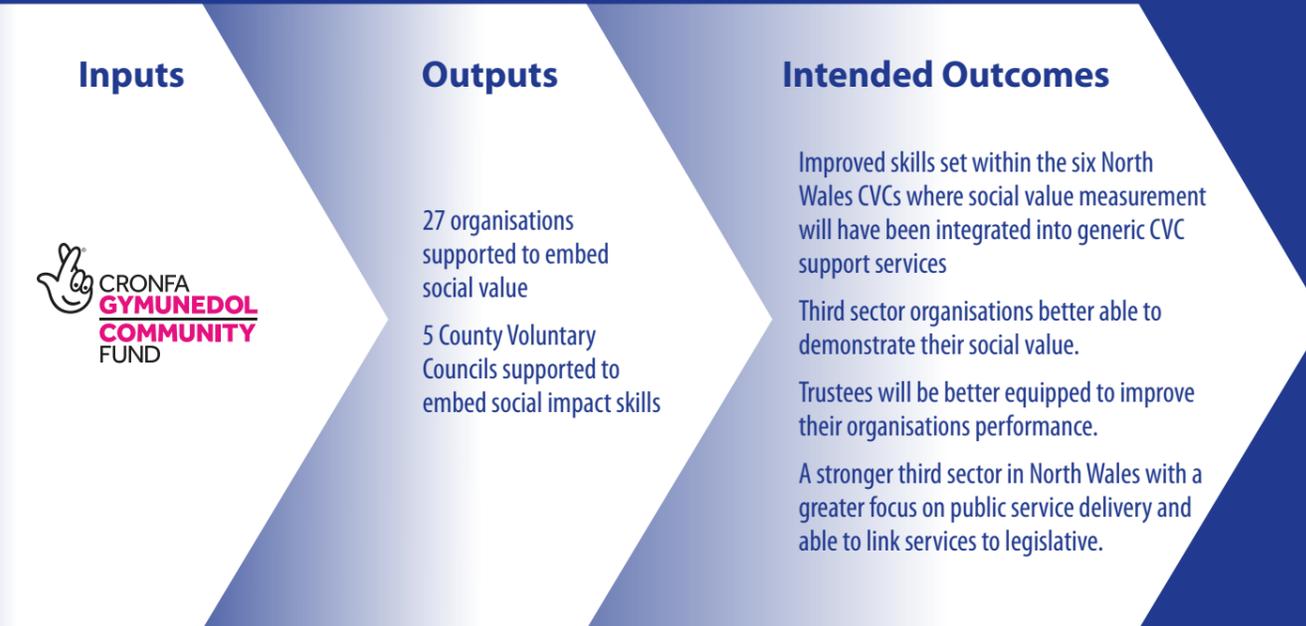
*“Being part of the Social Value Cymru project has been invaluable to Empower - Be The Change. As a relatively new start up social enterprise it has been great to receive so much support from Eleri and the team so that we could firstly identify the true outcomes our participants gain from our programmes and secondly implement robust and relevant measurement tools for us to measure the value and impact on an on-going basis.*

*The programme has helped us to identify when and how we create value, identify target segments and begin to make more strategic decisions about how we use our investment. Measuring social value has become embedded into everything we do as a company and this would not have happened without the support from Social Value Cymru.”*

Jo Clay, Founder & Innovation Lead

# Impact of the project

For every £1 invested in the project a Social Return on Investment of £1.71 was created



All organisations who completed the programme reported some positive change in the following outcomes:

- ✓ Organisations more able to measure the social value of activities
- ✓ Organisations able to embed social value principles in everything that they do
- ✓ Organisations able to use social impact information to inform decision making
- ✓ Organisations more able to report on social impact to internal and external audiences



**First infrastructure organisation in the UK to receive a Level 1 certificate demonstrating our commitment to social value**

Awarded a certificate for Highly Commended for a Project Award for Collaboration to Enhance Social Value of a Place at the National Social Value Conference in London January 2020



First Bilingual Advanced Practitioner in Wales

## Creating Enterprise

**CREU MENTER CREATING ENTERPRISE**

*“Working so closely with Eleri and the team at Mantell Gwynedd and Jan from CVSC on the production of our social value report proved to be an excellent opportunity for us here at Creating Enterprise to reflect on the achievements of our colleagues and volunteers, celebrate successes and identify areas for future development. We are delighted with the report’s conclusion on the social value of our volunteering service, which shows that every £1 invested in the project is worth £6 to society, calculating the social return on investment to be over £360,000 per year. We are also excited to include the report’s recommendations in our strategic planning as we move forward.”*

Sharon Jones,  
Director of Partnerships – Social Value



Eleri playing the Value game with volunteers at Creating Enterprise

## Your Place or Ours

**Canolfan Ni**

*Partneriaeth Gymunedol De Sir Ddinbych South Denbighshire Community Partnership*

A partnership was created in Corwen to develop an empowered, healthy and thriving community, where everyone belongs. The centre had become the heart of the community where they run lunch and social clubs, community transport, access to services and advice, family events and much more. They worked with the Social Value Cymru team to measure the impact but also to look at managing the impact and look at how to plan the project.



*“South Denbighshire Community Partnership and Citizens Advice Denbighshire have enjoyed and greatly benefitted from involvement in the Social Value Cymru project. It has improved engagement with stakeholders and improved evaluation skills. The learning and support will help us to manage the “Your Place or Ours” project and our wider work to maximise the benefit of what we do to our community”*

Graham Kendall, Bid development Officer

## Challenges What could have been better

**1** Some organisations felt that support over two years was too long, where others felt it wasn't long enough as getting the time and resources to embed the learning was challenging. What did seem apparent is that having support within County Voluntary Councils to provide basic support was beneficial, but having on-going expertise was also important. Having an active network was seen as important to maintain momentum and support.

**2** Some would have liked more time to focus on calculations.

**3** It was challenging to dedicate staff time to ensure these skills were embedded. However, some of the very small organisations were able to achieve this and therefore the size of the organisation didn't appear to be the main barrier but rather the nature of the service.

**4** Time was also a concern for CVCs, as being able to commit time to embed these skills in addition to their usual role was challenging and having dedicated resource for this would be more beneficial.

*“This is a great project which has enabled us to learn, understand and apply SROI to the organisation and it is really helping us to make strategic decisions about where we focus our time and resources”*

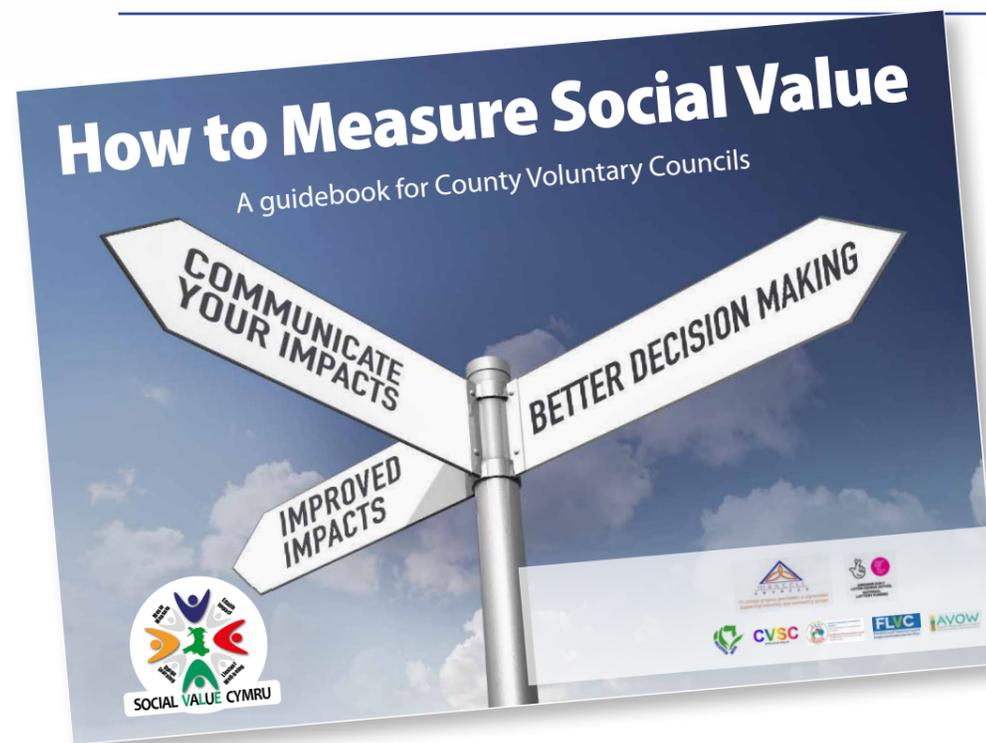
*“The project was well organised and the relationship created proved great for confidence. The field trip was very valuable and the measuring tool that was created is excellent as it records the evidence of how we arrived at our results and allows us to test where changes would be most effective.”*

*“Fantastic support, we would never have done this without the project!”*

*“Extremely valuable project for our charity”*

*“It has been very useful to be involved in the project. The team have been very helpful and supportive and we are very grateful to have been involved as we hope it will have a positive impact on the charity as we move forward to embed this. The toolkit is very useful and the conferences / meetings to share best practice have also been helpful in sharing our experiences and ideas with others. The project has been invaluable to the charity.”*

## Resources developed



A guidebook for County Voluntary Councils was developed to support staff to provide guidance to organisations on measuring impact

A guidebook for organisations and an Excel toolkit has been developed for organisations to measure and manage their social value. Available to download on the Mantell Gwynedd website along with a webinar.

## Key messages

**1** Embedding social value allows organisation to adhere to the requirements of the legislative framework.

**2** Organisations do need support to be able to embed these skills. It does take much time and resources but the value created from doing so was high.

**3** County Voluntary Councils are well placed to offer advice and guidance on social impact.

**4** Measuring and Managing social value allows organisations to demonstrate their social impact for both internal and external audiences, but more importantly allows them to make more informed decisions that can support them to maximise their social value.



## Ensuring a support network in North Wales to develop the social value agenda and ensure good partnership across sectors

### Social Value Network North Wales

The North Wales Social Value Network meets on a quarterly basis and is held across North Wales. Members range from University academics, Local Authority Officers, County Voluntary Councils, the Health Board, social enterprises and third sector organisations. The network provides an opportunity for members to meet up; debate and discuss their work; look at any challenges or solutions that they are experiencing, and to network with likeminded people.

### Social Value Forum

Part 2, Section 16 of the Social Services and Well-Being (Wales) Act 2014 places a duty upon Welsh local authorities, with local health board partners, to: "establish regional forums to support social value based providers to develop a shared understanding of the common agenda, and to share and develop good practice. The aim of this forum is to encourage a flourishing social value sector which is able and willing to fulfil service delivery opportunities."

The social value forum includes people from the third, independent and statutory sector

services who are exploring how to promote social value in public services. Mantell Gwynedd staff sits on the Social Value Forum Steering Group, and the aim is that every local authority will have a social value forum.

### North Wales Social Value Conference, October 2019

This event was organised in partnership with the North Wales Social Value Forum Steering Group that was set up in response to Section 16 of the Social Services and Well-being (Wales) Act 2014. One of the priorities identified for the next year by the North Wales Social Value Forum Steering Group is to establish / implement measures of impact of Social Value within commissioning and procurement activity across North Wales.

The presentations, workshops and round table discussions should assist us in our consideration to prioritise social value and social impact within our own organisations and how can we do this. More importantly, how can we all work together to agree on indicators to move forward and maximize the impacts of funding, commissioning and procurement. A full report of the conference is available on our website.

# Unique achievements of the project and legacy of the future

This was an unique and innovative project led by Mantell Gwynedd, and in addition to the outcomes achieved by others as mentioned in this report, this project can celebrate **unique achievements that will provide a lasting legacy.**

Firstly, our Social Value Manager became the **first Advanced Practitioner in Wales**, and is the only bilingual practitioner who is able to provide service in both Welsh and English. She is also the first Accredited Trainer in Wales accredited through Social Value International.

Mantell Gwynedd was also delighted to be the **first umbrella organisation successful in gaining a Level 1 certificate** as an organisation. This was awarded by Social Value International and demonstrates the organisation's commitment to social value.

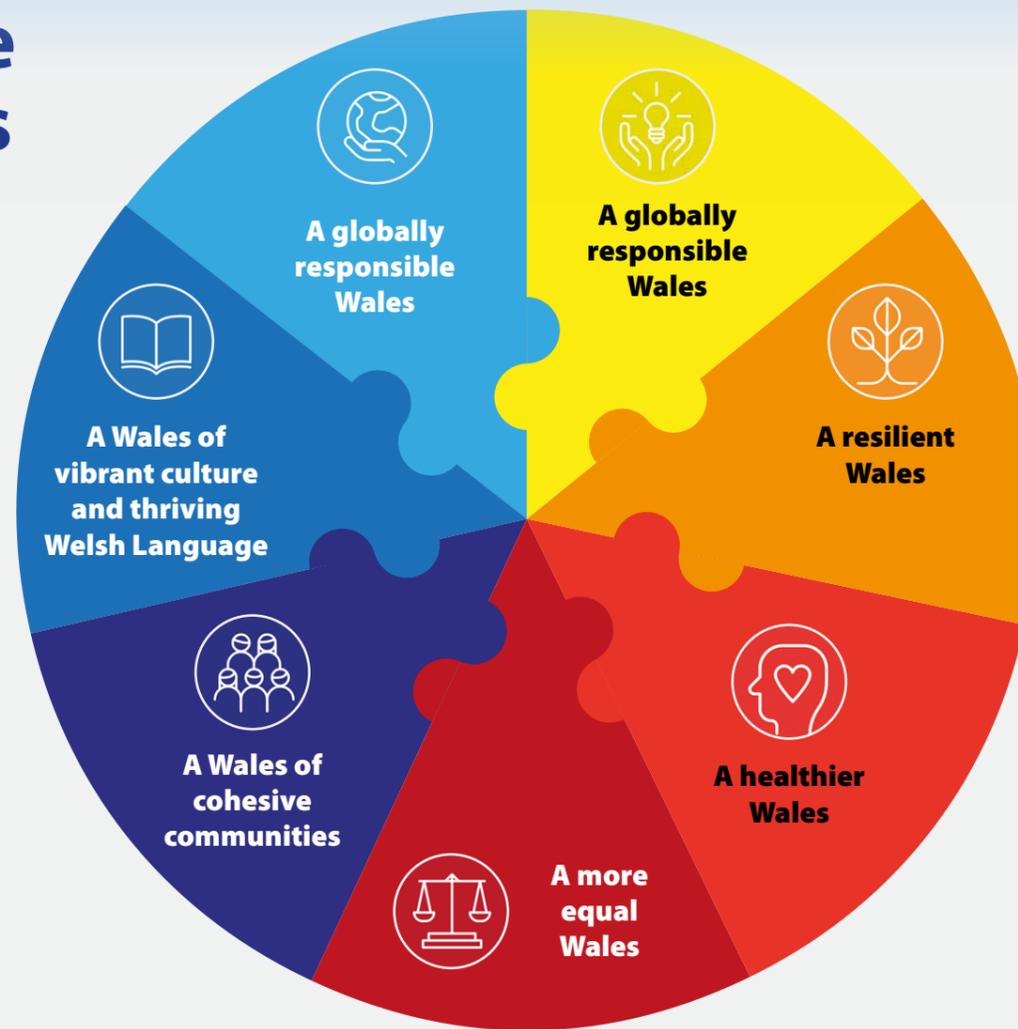
This investment has ensured a legacy for Social Value Cymru and is why the Board of Directors of Mantell Gwynedd are delighted to provide further investment for the continuation of Social Value Cymru. This ensures that Mantell Gwynedd can **continue to support organisations to embed social value** as well as be the leaders of the social value movement in Wales.



# How we contribute to the well-being goals in Wales

This graphic demonstrates how the well-defined outcomes created through the activities of these organisations contribute to the well-being goals as set out under the Well-being of Future Generations (Wales) Act 2015.

By working with the third sector, the public sector can make a positive contribution towards achieving these goals.




- Increased satisfaction from work / training / role
- Improved mental well-being
- Feeling empowered to make decisions



- Sense of achievement as able to reach full potential
- Improved mental well-being
- Felt less isolated



- Improved independence
- Improved mental well-being
- Felt less isolated



- Improved physical health
- Improved mental well-being
- Felt less isolated



- Children felt more confident to reach potential
- Improved independence
- Children felt less isolated



- Improved physical health
- Improved mental well-being
- Felt less isolated



- Improved physical health
- Improved mental well-being
- Improved social interaction



- Improved physical health
- Improved mental well-being
- Felt less isolated
- Improved independence



- Improved physical health
- Improved mental well-being
- Felt less isolated
- Increased confidence to find employment



- Improved physical health and mental well-being
- Reduced loneliness
- Able to reach full potential
- Improved independence a



- Improved physical health
- Improved mental well-being
- Felt less isolated



- Improved employment opportunities
- Increased feelings of self-worth / feeling valued
- Increased satisfaction from work / volunteering



- Improved physical health
- Reduced stress and anxiety
- Felt less isolated
- Improved independence



- Reduced stress
- Reduced loneliness and isolation
- Improved family relationships



- Improved mental well-being
- Reduced isolation
- Increased confidence to manage own finances



- Feeling safer in general
- Increased confidence to know what to do when in danger



- Improved physical health
- Improved mental well-being
- Felt less isolated

## A big thank you to everybody who contributed to this project, especially:

- All the organisations who took part and showed their commitment to embed social value into their organisation in order to ensure the best possible impact for their beneficiaries.
- All the County Voluntary Councils, and especially the staff members who were actively engaged with this project.
- The Big Lottery Community Fund for supporting this new and innovative project.
- Members of the Social Value Network in North Wales.



Social Value Cymru is a part of Mantell Gwynedd.

We offer support in both measuring and managing your social value by providing advice and consultancy to third sector organisations.

## What we can offer?

- Introduction to Social Value workshops
- In house tailored training courses
- Social Value Assessments
- A Toolkit for Trustees and senior managers for improved decision making
- Social Value International Accredited Practitioner support for your organisation
- Specialist advice and consultancy
- Mentoring support for championing social value within your organisation



*Yn cefnogi grwpiau gwirfoddol a chymunedol*  
Supporting voluntary and community groups



For further information contact us:

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[www.mantellwynedd.com](http://www.mantellwynedd.com)



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