

EXPLORING A COLLABORATIVE SOCIAL VALUE INTERVENTION

An invitation to tender

BUSINESS IN THE COMMUNITY

Chief Officers 3rd Sector

nicva

Social Enterprise NI

EMPOWERING PROFIT WITH PURPOSE, INSPIRING LASTING IMPACT.

COMMUNITY FUND

Introduction and context

Procurement Policy Note PPN 01/21 – Social Value in Procurement is at the heart of public procurement in Northern Ireland. The policy commits to embedding social value throughout the procurement cycle. The payment of the Real Living Wage must be included as a condition of contract and a minimum of 10% of the total award criteria must be allocated to social value – in other words, organisations bidding for government contracts must display how they will deliver a social value element as part of their tender. Contracting Authorities score social value across 4 themes and can choose which theme they score social value against.

This emphasis on social value has resulted increased opportunities for the VCSE and private sectors to partner, creating innovative, social value driven solutions for mutual benefit.

However, concerns remain that the VCSE sectors have not fully capitalised on the opportunity that social value presents. Similarly, the private and public sectors are also potentially falling short of realising the potential of social value. Therefore, Business in the Community, NI, Chief Officers Third Sector (CO3), Northern Ireland Council for Voluntary Action (NICVA) and Social Enterprise Northern Ireland (SENI) have come together to seek to understand the challenges and explore what a joint intervention could look like. This document outlines what these organisations have agreed a scoping study should entail.

Social Value

The need for intervention: Perspectives and feedback from the VCSE and private sectors

There is recognition that Social Value (SV) presents a unique opportunity to deliver social and environmental outcomes whilst at the same time providing additional resources to (and therefore, supporting the longer-term sustainability of) the VCSE sector. Indeed, there are currently several successful partnerships emerging which are delivering positive outcomes, demonstrating innovation, and leveraging significant resources to a number of VCSE organisations. Unfortunately, these are relatively small in number and scale and are not reflective of general practice.

Several key membership organisations across the sector namely Business in the Community (BITCNI), Chief Officers Third Sector (CO3), Northern Ireland Council for Voluntary Action (NICVA) and Social Enterprise Northern Ireland (SENI) came together to share their experiences and insights, following feedback gleaned from their members during events and joint workshops, together with consultations with business. Such feedback highlighted that whilst there is a keen interest in maximising the opportunities

that delivering social value can bring, it is clear that there are several challenges. These include:

- Lack of understanding of social value procurement and partnerships across the VCSE sector, with various versions of what social value means and requires
- Lack of time and capacity for CEOs of VCSEs to invest in addressing the opportunity that exists, given the wider range of additional challenges they currently face
- Limited understanding and experiences of engagement between VCSE sector and businesses in developing joint projects
- Lack of awareness of what success and good practice looks like for VCSE organisations and businesses

These challenges, amongst others, have resulted in membership organisations having an interest in maximising the opportunity presented by social value, coming together to consider the opportunities and challenges and develop a collaborative way forward. Whilst recognising the need to meet the overarching social value requirements of public sector contacts, it was agreed at the outset that the partners have an opportunity to develop a collaborative project that would seek to:

- Improve the confidence, skills, and capacity of the VCSE sector to build partnerships across sectors, addressing readiness/sector capacity for reserved contracts and contracting authority knowledge of how to reserve/co-design/grant fund
- Increase the quantity and quality of partnerships in social value projects that will provide positive social and environmental outcomes
- Generate revenue streams and/or resources for the VCSE sector that would improve the levels of financial security and reduce the reliance on grants
- Help develop innovative solutions to pertinent social and environmental challenges through social value partnerships

Leveraging the potential of social value to transform the VCSE sector: Taking a collaborative approach

Developing a collaborative approach to delivering social value across the VCSE sector has potential to significantly transform the sector in Northern Ireland by fostering innovation, sustainability, increasing impact, and fostering stronger community engagement by:

- Embedding innovation in service delivery, funding and addressing community need
- Fostering greater collaboration between government, business, and communities
- Using social value to drive meaningful change and delivering outcomes and impact
- Strengthening the sector's financial resilience in the longer term in a challenging funding environment
- Specifically, this will create opportunities for the sector to
- Develop new funding models and investment opportunities

- Encourage meaningful community led design and participation which addresses real need in communities
- Embed social value into procurement and commissioning to generate meaningful impact
- Enhance skills development and workforce innovation through partnerships with business
- Foster digital transformation and data driven decision making though greater use of technology

Objectives of the scoping exercise

The primary objectives of this scoping exercise are to:

Assess the current landscape: Understand existing awareness, capacity, engagement with, and implementation of, social value among VCSEs in Northern Ireland. This will include identifying examples of good practice.

Identify opportunities: Explore the scale of the opportunity for the VCSE sector, the scale and extent of existing projects and identify potential areas where social value can be leveraged for greater impact. This will extend to exploring how social value outside Northern Ireland is engaging VCSE sector in other regions, including identifying examples of best practice.

Stakeholder engagement: Engage with key stakeholders to gather insights and perspectives on social value. This will include CPD, SIB's Social Value Unit. Centres of Procurement Expertise (CoPEs), businesses across different sectors. together with a range of VCSE organisations (these will include those who are actively embracing the opportunity and those who for various reasons have not considered/explored the opportunity.)

Barriers and enablers: Identify the barriers to, and enablers for, maximizing the opportunity that social value presents to both the sector and to business.

Identify potential future intervention model: Present short to medium term intervention options to meet the needs identified.

Long-term sustainability: The scoping exercise would additionally make recommendations for a longer-term project, how this could be resourced and its potential to become self-sustainable.

Requirements of the scoping exercise

It is anticipated the scoping exercise that will be comprised of the following elements:

Desk Research

- **Review of literature**: Analyse existing research, reports, and case studies on social value in Northern Ireland and beyond
- **Best practice review**: Analyse examples of good practice in engaging VCSE participation in delivering social value both in Northern Ireland and beyond
- **Policy analysis**: Examine relevant policies and frameworks that support or present challenges to the implementation of social value
- **Explore funding framework**: identify funding frameworks and approaches that will help support the longer-term sustainability of a future support mechanism in this area

Stakeholder Mapping and Engagement

- **Introduce a Stakeholder Consultative group** who would provide oversight to the scoping project, review progress and provide additional insight. The stakeholder group would include the 4 partners (outlined in appendix 1) together with a representative from the SIB's Social Value Unit. In addition. we would extend the steering group by including a representative from a Rural Community Network together with 1/2 organisations with experience of delivering social value contracts. This group would meet throughout the course of the scoping project as well as participate in the study visit.
- **Identify key stakeholders**: Map out all the key stakeholders and their roles in maximising the opportunity that social value brings in Northern Ireland
- **Interviews and surveys**: We propose to undertake a survey with those key stakeholders to identify the key themes followed by a series on interviews (12-15) with a representative sample of stakeholders to gather qualitative and quantitative data. This will be followed by include 3/4 focus group discussions with key sectors including VCSE organisations x2, Business, Procurement/commissioning bodies.

Data Analysis

- **Data collation**: Compile and review data collected from desk research, interviews, and surveys
- **Gap analysis**: Identify gaps in current practices and opportunities for improvement
- **What works:** Identify examples of good practice in NI and elsewhere

Study visit

- As part of the 'what works' analysis we would schedule a study visit to a key region to those explore examples of good practice, understand the environment, meet with key stakeholders, and visit examples of social value projects. In addition, we would organise

visit(s)/discussions/meetings with to best practice examples in Northern Ireland. Please note, the study visit does not fall within the remit of this invitation to tender.

Report and Recommendations

- **Draft report**: Prepare a draft report detailing findings, insights, and preliminary recommendations
- **Stakeholder feedback**: Present findings to the Stakeholder Consultative group for feedback and validation
- **Future project opportunity**: prepare an outline proposal for appropriate intervention, based on findings from the development project
- **Final report**: Incorporate feedback and finalise the report with clear, actionable recommendations

Key Deliverables

- An **initial report** detailing the plan and timeline of the scoping exercise
- An **interim report** highlighting the preliminary findings and emerging themes
- A **final report** outlining the findings, analysis, and recommendations to include:
  - An outline of the potential financial opportunity and the impact that social value can bring to the VCSE sector and the wider community
  - Examples and models of good practice and innovation in delivering social value
  - Proposals and solutions maximising the opportunity for the VCSE sector from social value and overcoming the barriers
  - Proposals on the role of the key stakeholders in maximising the opportunity.
  - Identify an overarching intervention project and plan to build the VCSE sector's capacity to maximise the future opportunity that social value can bring
  - Proposals for future funding model(s) that will sustain the longer-term financial security for a Social Value resource/support framework for Northern Ireland
- **A presentation of findings** to be shared with partners and key stakeholders

Timeline

The proposed timeline for the scoping exercise is as follows:

- **Weeks 1-3**: Inception phase, desk research, and stakeholder mapping
- **Weeks 4-10**: Stakeholder engagement (interviews and surveys)
- **Weeks 10-14**: Data analysis and interim report together with study visit
- **Weeks 15-18**: Draft report and stakeholder feedback
- **Weeks 18-20**: Final report and dissemination of findings

Submission Details

We invite you to submit a proposal to undertake the scoping study detailed above. This work may be carried out by an individual consultant, a team, or a collaborative partnership. Those submitting proposals should have provide evidence of:

Experience

- Undertaking studies of similar scope, nature and complexity
- Recent (3-5 years) relevant experience working with the NI voluntary, community and social enterprise sectors

Proposed methodology, including:

- For each area of work outlined in the requirements, the approach which will be taken to managing and delivering the work, and
- An explanation of how resources will be allocated, including the number of days/hours by team member

Qualifications, including:

- Details/CV of the person who will have overall responsibility for delivery and management of the contract, including their relevant experience, qualifications and the role they will play
- Details/CVs of specific team members who will be engaged in the contract, together with the relevant experience, qualifications and role in delivery

Budget

The budget for this study is £20,000, inclusive of VAT. An additional, modest budget has been allocated for the study visit, the coordination of which does not fall within the remit of this study.

Award criteria

Area	Percentage points
Approach and methodology	40
Experience	40
Timescale	10
Cost	10

Timeline

Proposals must be submitted via email to lisa.mcilvenna@bitcni.org.uk no later than Monday 17 November at 5pm. Late submissions will not be considered.

Contract management

Management for the scoping exercise will be provided by the Stakeholder Consultation Group which will include the 4 Partners: BITC, CO3, NICVA and SENI and SIB's Social Value Unit. Business in the Community (NI) will be the lead partner and will manage the delivery of the project, with Dr Lisa McIlvenna providing the lead partner role for Business in the Community.

In addition. we would extend the steering group by including a representative from a Rural Community Network together with 1/2 organisations with experience of delivering social value contracts.

About the partners

The partners for this project include the key VCSE membership organisations involved in promoting and supporting their members on delivering social value.

Business in the Community, Northern Ireland is the responsible business network or Northern Ireland. A UK registered charity and membership organisation, it exists to support and challenge business to be a force for good in society. The organisation has a presence in all parts of the UK and a sister organisation in Ireland. It works with organisations that are committed to doing business responsibly; doing this by investing in their people, the planet, and the places where they operate.

CO3 – Chief Officers Third Sector CO3 is the leading representative body for the leaders of the Community & Voluntary sector all over Northern Ireland. CO3 works to increase skills, capacity, and the visibility of the community & voluntary sector through a collaborative model that creates a space for information sharing, training, development, and support. CO3 has 850 members comprising chief executives, senior managers, chairs and trustees of community and voluntary organisations.

Northern Ireland Council for Voluntary Action (NICVA) is a membership and representative umbrella body for the voluntary and community sector in Northern Ireland. With over 1,500 members , NICVA lobby and campaign to advance the interests of the people and communities that its members support. It offers a wide range of practical services, products, and support to its members and the wider VCS to help them do what they do best - find innovative solutions for social challenges.

Social Enterprise Northern Ireland (SENI) is the representative body for social enterprises and social entrepreneurs across Northern Ireland. It is an independent, member-led organisation and a gateway for social enterprises in Northern Ireland. The organisation focuses on connecting, supporting, developing, and sustaining vibrant businesses to create social change.