



Analysis of Social Value Forum Reports

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1. Introduction

The Social Services and Well-being (Wales) Act 2014¹ sets out the duty (Part 2, Section 16) placed upon local authorities to consider, develop and promote the not-for-profit community of social value organisations to deliver alternative care and support models. The aim is that such models will contribute to the preventative and early intervention agenda outlined in the Act. Section 16 (Box 1.) outlines the types of models that should be explored to deliver care and support services now and in the future. The Code of Practice (Part 2) and guidance on the exercise of social services functions and partnership arrangements (General Functions) states that:

‘People should be involved in designing and operating services at all levels from individual and populations. Local authorities must seek to empower people to produce innovative solutions for delaying, preventing and meeting the need for care and support through local networks and communities’

Section 16 (Code of Practice) requires that local authorities and partners (e.g. Health Boards) establish seven regional forums to support and develop social value-based organisations and take forward a social value programme of work. The intention is to create the conditions to adopt and share innovative practice through a collective understanding and appreciation of social value. The Wales Co-operative Centre were commissioned by Welsh Government to develop a toolkit, published in 2018, to help to develop the role and remit of Social Value Forums and that of the wider social value community in delivering alternative care and support services, as key aspiration of the Act.

The purpose of the Forums was to bring together a range of people and organisations across public, private and third sector to look at and share good practice within the social value arena and to develop innovative care and support models fit for a sustainable future. Social Value Forums, as part of their responsibility, is to report progress and submit every three years a report on how the Forum has progressed to deliver the duties outlined in Section 16, and how local authorities and partners have involved people in the co-design and co-delivery of services within the context of Social Value Forums and the Act itself.

This report sets out the findings from seven Social Value Forum reports submitted to Welsh Government in March 2019 (first report), and feedback from a workshop held at the Health and Social Care Conference (21/05/19), which has contributed to Section 7 of this report.

¹ Where referred to as ‘the Act’ specifically refers to the Social Services and Well-being (Wales) Act 2014

Box 1. Part 2, Section 16: Duty to promote social enterprises, co-operatives, user-led services and the third sector Regulations, 2015

'Section 16(1) of the Social Services and Well-being (Wales) Act 2014 ("the Act") imposes a duty on local authorities to promote social enterprises, co-operative organisations, co-operative arrangements and third sector organisations to provide care and support and preventative services in their area. Section 16(2) defines "social enterprise" and "third sector organisation". The definition of "social enterprise" includes a requirement that its activities are wholly or mainly activities which a person might reasonably consider to be activities carried on for the benefit of society. "Third sector organisation" is defined as an organisation which a person might reasonably consider to exist wholly or mainly to provide benefits for society. The reference to "society" in both definitions is defined as including a section of society.'

2. Methodology:

In brief, Content Analysis (CA) methodology summarises the subject matter being studied and makes replicable and valid inferences by interpreting in a systematic manner the qualitative narrative. The qualitative data can be quantified, but for the purposes of this report, only the qualitative narrative analysis is reported in full due to insufficient quantitative data provided by several Social Value Forums. Content Analysis looks for patterns or themes in content and the relational context between them by identifying words, themes or concepts within text or a set of text such as the seven Social Value Forum reports. The process of coding the text, is one of selective reduction, identifying the patterns and themes in the reports that are indicative of the subject matter being studied. The main advantage of using this approach is that it provides the means to delve in-depth and become immersed in text methodology.

The aim of reporting the outcomes of the development of Social Value Forums in Wales was to understand their overall progress across several key domains and to understand:

- How the Social Value Forum were established, who was involved and how?
- The role of partners and stakeholders and how they were engaged?
- How Social Value Forums have responded to meeting the key principles of the Social Services and Well-being Act, the Well-being of Future Generations Act and *A Healthier Wales*?
- What the social value sector says about the Social Value Forums in supporting the development of social value organisations?
- What the Regional Partnership Boards and statutory partners says about the Social Value Forum in supporting the development of social value organisations?
- The aspirations of Social Value Forums; the next steps in their development?
- What support needs could Welsh Government and other agencies provide to the Social Value Forums?

The nine domains:

1. Establishing your Social Value Forum
2. Stakeholder engagement
3. Measuring impact (delivering on key principles)
4. Feedback from the social value sector
5. Feedback from the Regional Partnership Boards and statutory partners
6. Case studies
7. Quantitative information
8. Aspirations for future development/work programme for the next 3 years
9. The role of Welsh Government and other support agencies

3. Findings

The Social Value Forum reports were varied in their reporting with limited information on how they have progressed developing and establishing alternative models of care and support services through social value organisations, which have not-for-profit governance arrangements.

3.1 The main themes

Table 1 (Appendix 1) sets out, in brief, the key themes based upon the analysis across the domains outlined in the reporting framework. However, it should be noted that the reporting against the nine domains was variable and in some cases no information was provided.

3.1.1 Establishing Social Value Forums

Positively, at the time of reporting, seven Regional Social Value Forums have been established on a Regional Partnership Board footprint. However, they have developed at different stages and at a different pace and, in some cases, it had been a '*slow gestation period*' to their formation. While the Forums have similar terms of reference and objectives, how the Forums have been established has been dependent upon what previously existed in some regions (e.g. a Provider Forum), as the starting point. For other regions it has taken time to establish, what could be described as a Social Value Forum, and for the purposes of meeting the Section 16 duty, using a title such as an Innovation Forum. The secretariat for the Forums was varied, either funded by a Regional Partnership Board to a County Voluntary Council or provided by a local authority or commissioning unit.

There was a varied understanding of the role of a Social Value Forum; that they should be a vehicle support local initiatives and share learning. Where information was provided, the membership across the Forums was diverse, and in some cases with over 90 third sector organisations involved. It was unclear as to how citizens were involved as co-producers, with only one Forum having citizens (n:3) as members on the steering group which established the Forum.

3.1.2 Function of Social Value Forums

Most Social Value Forums meet at least quarterly and saw their role as being a conduit for partnership working, and open to all social value-based organisations, including private providers to reflect a mixed market economy.

The Forums did see themselves as a place to:

- Steer social value,
- take a consortium approach to explore opportunities to develop new forms of social value care and support delivery models outlined in Section 16,
- share resources,
- focus on specific key principles of the Act and specific communities of need through a workshop approach, and
- make recommendations to Regional Partnership Boards around commissioning different models, although varied as to what mechanisms are being used to:
 - Communicate up and receive feedback from Regional Partnership Boards unless there was representation from members of the Regional Partnership Boards on the Social Value Forum and vice versa,
 - or there was a standing item on their respective agendas.

3.1.3 Understanding the principles of social value

While the toolkit developed by the Wales Co-operative Centre provides a definition that includes some of the principles of social value, that ‘social value’ is a *‘value-base that promotes respect, collaboration and collective endeavours towards securing well-being outcomes for individuals and communities’*, there is a lack of clarity as to whether the principles are understood, applied or set within the context of the core principles of the Act. It is unclear how useful the toolkit has been in supporting the development of Social Value Forums and their understanding of the underpinning principles of social value. Several Social Value Forums have developed organically rather than have their development executed through a toolkit.

One Social Value Forum described social value as *‘maximising the positive outcomes and well-being of local people, influencing local service provision, and adding value and focus to what matters to people in a way that exceeds exclusively monetary value’* and is a good starting point. Nonetheless, it is not clear that Forums have a collective understanding of what is meant by social value with the need for constructive dialogue and agreement on a common definition across Social Value Forums and the wider social value sector. It is less certain how the principles of understanding what change happens because of social value (the social impact) is being applied across the Social Value Forums and how it is measured. One Social Value Forum notes the use of SROI through a Lottery funded project, which predates the formation of the Forum. Furthermore, the principle of ‘do not over-claim’ is not being applied and the Social Value Forums need to be clear as to what has been generated through the Social Value Forum itself.

3.1.4 Understanding the role of social value organisations

The Section 16 duty is explicit in setting out the types of models that should be promoted, but less explicit about how to develop such models. The Social Value Forums considered that by promoting new models would cultivate innovation in care and support services. Their role would be to engage across the social value sector and encourage sector growth, but there was a need to define social value organisations.

3.1.5 Engaging with stakeholders

As one Social Value Forum commented, social value *'is everyone's business'*. Social Value Forums need to be representative of the wider social value sector, open to any provider across the social value sector, but with the need to clarify the sector to avoid narrowing the field by becoming exclusive. However, it was felt that the Forums should be *'owned'* and directed by social value organisations and service users. Yet there was not enough evidence to suggest this was the case and was counter to the view that all those involved in championing social value should be involved. It was felt that there needed more support from Transformation Teams to develop new service models with a broad range of stakeholder involvement.

Stakeholder engagement had, in part, improved understanding of and co-operation across providers, with mechanisms in place to link to other third sector networks to widen the net and encourage involvement. The County Voluntary Councils were important in their role in communicating to the wider third sector to promote social value and feedback to Social Value Forums the views, experience and activity locally and regionally. It was less clear how citizens were involved in or members of Social Value Forums, and how Citizen Panels, local authority or region or both align with or interact with the Forums and vice versa. The Citizen Panels have the ability reach further to the wider public than the Forums and would be a valuable resource as co-producers and a sounding board for Forums as their ideas and innovative practice grows.

4. Other findings

4.1 Impact

It is fair to say that that the Social Value Forums are still forming their identity and place in regional governance structures. There was a lack of evidence as to how the Forums had met or were meeting the key principles of the both the Social Services and Well-being and the Well-being of Future Generations Acts by developing and establishing new models generated directly through the Forums. It was considered, from an integration perspective, that the Forums had improved co-operation, created open dialogue and information exchange across sectors. The Forum has also provided the opportunity to share professional practice, integrative thinking and action. Forums had agreed, in part, working relationships with Regional Partnership and Public Service Boards, with cross over representation. It was unclear how their agendas worked together to improve citizen well-being.

Co-production is at the heart of the Act, but there is a lack of clarity as to whether citizens are involved not only with the Forums, but also how they connect in or how widely citizens are aware of the Forums and their role. 'Co-production' appears to be happening at an organisational level or within various boards and networks rather than directly with citizens (e.g. service users and carers). Several Forums had however, engaged with the Co-production Network for Wales and had received training around the principles of co-production in practice. Several Forums had set up co-production steering groups to support and influence the social value agenda.

4.2 What the social value sector says about the Social Value Forums

The sector felt that there may be some confusion by the range of terms being used by policymakers to describe social value and social value organisations. The 'sector' may not identify themselves as being a social value organisation as it is not in the vocabulary of their organisation.

The sector considered that there had been:

- A lack of involvement and co-production at all levels with citizens and this would lead to poor service design and delivery of care and support services.
- Not enough emphasis on children and young people's services.
- A lack of investment in community assets and third sector organisations.
- A lack of equality in decision-making.
- Social Return on Investment to measure social value not consistently applied and other tools used which made it difficult to compare.
- A lack of an innovative and creative agenda; that Forums were reactive to the Regional Partnership Board agenda, not solution-focused but more of a *'talking shop'*
- Forums were being driven by what the Regional Partnership Boards wanted rather than the social value agenda being driven by the Forums themselves.

Constructively, it was felt that by establishing a Social Value Forum it had encouraged partnership working across third and private sector providers and would give the opportunity to contribute to new models of care. The sector did see the Forums as a place to foster inclusiveness, trust, openness and transparency and a means to share and explore mutual interests. The development of workshop-based sessions on specific subjects had been useful to all involved, but it would be helpful to and more tangible to set up task and finish groups to test out/pilot new models without the need to appoint external consultants. The expertise was around the table and out in the wider community.

The sector did want an agenda that was less regimented without numerous standing items and that it should not be *'about what the partnerships (RPBs and PSBs) want from the forum members'*, but that the sector wanted to create *'a more purposeful and innovative agenda looking at creating solutions together rather than a forum to receive partnership information'*

and being reactive. There is a wealth of talent around the table which could be put to good use moving forward’.

4.3 What the Regional Partnership Boards and statutory partners say about Social Value Forums

The Regional Partnership Boards and statutory partners considered that the Forums were a ‘*sounding board*’ for the health and social care sector. The Forums provided the opportunity to understand the views and concerns on common issues through gaining multiple perspectives in relation to social value and how the Forums can help to develop the foundational economy. It was highlighted that there was a need to closely align Regional Partnership and Public Service Boards activities which promote the development of community assets and resilient communities, but there needed to be a flexible approach to commission social value and social value organisations. There were concerns that private or commercial providers may not have the opportunity to contribute to Social Value Forums and needed to be engaged alongside social value organisations operating in the third and community sectors. A critical aspect to ensure that the Forums had the mandate and resources to operate and that the Regional Partnership Boards needed to support both.

4.4 Aspirations for the future

The Forums wanted a dedicated resource to develop social value initiatives that were driven by the Forums and that it would be clearly outlined as a responsibility. While, the priorities were agreed and set out in the Local Area Plans, the Forums had a role to play in responding to gaps in provision as they emerged as well as linking into the Information, Advice and Assistance offer. A key priority would be to map the current engagement practices within key populations (e.g. older people, learning disability, children and young people) to build a framework to support future involvement practices across the Forums and the Regional Partnership Boards. One report indicated that *‘there is indeed a need for resources to facilitate SVF, and also the realisation that for the SVF to evolve, new ways of co-producing work streams with CVSs, the (transformation) programme office and the RPB will need to be defined’.*

4.5 Role of Welsh Government and other support agencies

The Social Value Forums considered that the Welsh Government could more clearly define:

- *‘The sector’* outlined in Section 16
- The term *‘Social Value’*
- The *‘Social Value Sector’*
- *‘Social Value organisations’* as currently interchangeable with third sector, voluntary sector and not-for-profit.

Forums wanted to know fully what was expected of them and how long Welsh Government expecting them to function. The Forums suggested that the following would be helpful:

- Agree what is to be measured and what tool or tools could be used across Social Value Forums and across social value organisations.
- Where Social Value Forums fit within regional governance arrangements.
- Provide technical advice and support about flexible commissioning and procurement processes.
- Ring-fenced funding for Social Value Forums through County Voluntary Councils and to enable citizens to become involved.
- Awareness raising more widely about social value; what it means to the population.
- Create a learning and research centre for social value; a community of practice to share experiences.
- Clearer information as to what is to be reported and how the Social Value Forum reports will be shared.

Further to this, one Forum reported that they had some concerns as to how information should be gathered without the agreement of all parties and how the information from the report will be used. The report highlighted the need to have an agreed set of qualitative measures for case study purposes and those measures needed to be developed co-productively.

5. Case studies

A few of the reports provided case studies but were mostly of service delivery models conceived several years ago and were outside the timeframe, despite indicating that there had been no projects established and delivered by the Social Value Forum. However, the case studies did signal, in part, that the principles of social value and co-production are alive', even though they may not be understood, or such terminology used. The Swansea Autism Movement (SAM) is a good example - parents and carers of children and young people with Autism identified a gap, took the lead and worked together with the local authority to develop activities for children and young people during school holidays. However, the Social Value Forums were not the initiators nor had evidence as to what their role had been. Positively, there was recognition that the Forum should be generating initiatives but should be led by people who are or have or likely to benefit.

6. Quantitative information

The quantitative data (Table 2, Appendix 2) provided was varied, insufficient or missing to provide an overall quantitative picture due to the various stages of Social Value Forum development. Where comprehensive information was set out, as to the allocation of grants or contracts to not-for-profit organisations (n:2), it was not clear or stated whether they were social value organisations. The value of the Integrated Care Fund (ICF) allocated to not-for-profit social value organisations is helpful to monitor how Regional Partnership Boards will increase to a minimum of 20% they are expected to achieve, but the data is also incomplete. One report did indicate that ICF funding had been allocated to a County

Voluntary Council to develop a Forum regionally. There were concerns about how much data should be gathered and how the current reports will be circulated.

The data required on the number of projects established and delivered by Social Value Forums is clear but may not be effective in identifying social value organisations when an organisation does not equate themselves with such a title. However, where indicated, it appears that the projects have been developed elsewhere and prior to establishing the Forum. One report indicated that 30 projects had been delivered by the Social Value Forum, but the projects pre-existed. One report did outline one project was established in a precursor forum, but not as the result of the current Forum. However, one Forum was able to set out that several contracts were procured where social value needed to be evidenced as part of tendering processes.

7. Discussion

Social Value, as a concept, is problematical and nebulous, means different things to different people, depends upon the context, with the context that is liable to change, and is difficult to measure without common agreement to ascertain what is likely to change because of social value. While ‘Social Value’ is a term that is being increasingly used to ‘quantify’ the worth placed upon a social value interaction or intervention, the term ‘social value’ has become interchangeable with social impact and social benefit. Social Value has been variously described and defined, with Henriques (2014) suggesting that social value and social impact have become ‘buzzwords’ and mean ‘*much the same thing*’. However, it could be argued that they are intrinsically different, but are connected by an interdependency context/mechanism/outcome matrix to achieve improved well-being outcomes for individuals and communities. and as a starting point:

Social Value: The worth placed upon the social value interaction or intervention (the mechanisms, what happens to generate an outcome).

Social Impact: The change that has happened as a result of the value (worth to an individual); the effect of that worth (outcomes).

Social Benefit: The contribution the value and impact has made to the community (wider context).

Social Value	Social Impact	Social Benefit
- The worth placed upon: e.g. It gets out of the house	- The difference it has made: e.g. I feel less isolated	- The overall gain to the wider community: e.g. more people active in the community

Therefore, **social value** means the worth or value base that is placed upon delivering a care and support service in a certain way to an individual or community of need that promotes respect and improves the individual and collective well-being. **Social impact** means the effect of that worth has on an individual or community that has benefited from a social

value provision or activity (the overall difference it has made). Importantly, the correlation between the two and their contribution to society is not clearly understood with the interchangeable terms being used which makes it difficult to measure effectively and 'quantify' social value. If we were to define a social value organisation, there is a need to be clear that social value is not interchangeable or the same as social impact or social benefit. To reiterate the impact is the change that has occurred (for a group of people for example) because of the value that has been placed on what has been provided and the outcomes it has produced.

Demonstrating and measuring social value is somewhat abstract and subjective. From a practical perspective it presents several challenges as there are numerous impact measurement tools being used (SROI, Theory of Change, Most Significant Change). The focus on social value has led to a focus on how much, in terms of pounds, does it save. However, there is no agreed market value attached to social value itself. Indeed, should there be a price attached to social value? Where attempts have been made to quantify, it is argued that if £1 is spent on the delivering a social value service, *'can that same £1 be used to also produce a wider benefit to the community?'* (Social Value UK), but what is 'saved' is only a theoretical saving. It is more complex than to look solely at the unit price per contact, with the need to consider the net impact to an individual. It involves looking beyond the price of each individual contract and instead examine the collective benefit to a community. This is not clearly understood. One report asked an important question about:

'What are we measuring and for what purpose, how to show the difference, some things not easy to quantify, is it about improving arrangements and delivery of services, who is accountable, contribution to behavioural change, impact, (has it taken some pressure off the main pressure points in primary, secondary and social care?' (comment from the social value sector)

The wider social benefit in delivering health and social care contracted services needs to happen through:

- A flexible and co-produced commissioning and procurement process which does not focus on a monetary unit to rationalise social value.
- Tender documentation sets out that tenderers need to give clear information on a) how they have co-produced and b) the social value, likely social impact and the overall social benefit to the wider community.
- Looks at what will be beneficial to people and within communities of need in achieving the well-being outcomes as outlined in the Act, in the Well-being of Future Generations (Wales) Act, 2015 and in *A Healthier Wales*.
- Social value needs to be reflected in service specifications and how prospective tenderers evidence social value, but there needs to be clarity of understanding of what is meant by social value in the first place.

There needs to be a collective view and agreement on the definition of social value and to establish a set of principles - the value base (e.g. around co-operation, involving citizens)

which are workable and prudent. However, defining social value more rigidly may hinder it from growing more organically across sectors, whoever is likely to deliver it. Consideration needs to be given to the original intentions of Section 16, but re-thinking and re-shaping the notion of social value so as not to exclude a wider contribution would be a useful exercise.

Section 16 needs to be more explicit as to what is expected of people and organisations. The workshop delivered by the Wales Co-operative Centre at the Health and Social Care conference echoed the findings from the reports and identified that:

- People struggle with the concept of social value and that further debate is required to provide clarity and meaning.
- Citizens need to be engaged, have a voice and are central to help shape and deliver social value care and support services.

What is uncertain is how citizens have been involved in Social Value Forums. When the term 'co-production' is used, it is commonly framed within how the Forums have involved people or partners at a more organisational level. Positively, there are some Forums which have set up Co-Production Steering Groups, but it is unclear as to whether citizens are involved in these groups. Involving with citizens, in the spirit and an objective of the Act and *A Healthier Wales* means being proactive, not only regionally, but locally with:

- The right people around the Social Value Forum 'table' or,
- connected in via citizen or user groups or panels and have social value champions in place across sectors to promote citizen involvement.
- The Forums should not be just the domain of Section 16 organisations, but an open forum which includes the private and independent sectors who are able to demonstrate being a social value organisation.
- From the perspective of the Act, a social value organisation would have embedded the core principles of the Act into their governance and delivery (e.g. co-production at the heart, has a preventative and early intervention agenda, that the voice of people is central and that they work in an integrative manner), and
- alongside this, the organisation will have certain characteristics, one being how labour is divided, which is usually mutually agreed, and secondly, where within organisations, mutual respect is highly valued. It should not mean that a health provision or an in-house social care service would be excluded just because they are not described in Section 16, if that is how a service is run and that social value can be evidenced.

Section 16 appears to work on the premise that social value is something that only happens within the domain of the models set out in the Act, and that through creating those models' social value will be present. Section 16 models are different governance models, how they operate and what they deliver may not be new or innovative or provide social value. Social Value Forums need to review their purpose and understand where they can be the activators of change models, whoever is likely to deliver.

The reports show variability in progress and while those variables may not always be an issue, there is a danger the Regional Partnership Boards may not see the value of those Forums. If more formal links are not established, it is likely to inhibit innovation if there is not a buy-in from Regional Partnership Boards. Social Value Forums need to be able to take the baton, be permitted to be the leaders and have a mechanism in place to generate and promote new ideas that should be funded whether through the Integrated Care Fund, the Transformation Fund or indeed from other funding pots. Critical to this is how those innovative ideas are translated into practice, shared and mainstreamed. It is valid to say, as a volunteer contributing to a Social Value Forum report stated that: *“translating and changing the language from the Act and toolkit to what it really means on the ground has been one of my first concerns, and one which we will continue to face if we are to engage with more people and organisations. We need answers to questions such as “What stuff does the SVF do?” and “Why will it help what the third Sector does?”*”

7.1 Key questions to consider

1. Is defining more clearly what is meant by social value and a social value organisation helpful and useful?
2. Are right people around the Social Value Forum ‘table’?
3. Are citizens connected? How can we encourage co-production?
4. Should Social Value Forums just be the domain of Section 16 organisations as defined?
5. How can SVFs generate activity and create innovative models? What support do they need?
6. What is the role of the CVC and third sector RPB representatives in influencing the RPB agenda?

7.2 Recommendations:

- Agree how the information from the Social Value Reports is to be disseminated.
- Report back to the Social Value Forums on the findings.
- Host a learning event bringing together chairs and leads for the Social Value Forums from across Wales to provide an:
 - Overview of the findings
 - Purpose of Social Value Forums
 - Successes and challenges
 - Defining social value and social value organisations
- Work towards a practicable definition of social value and what constitutes a social value organisation.
- Review and refresh the Social Value Forum toolkit to ensure it is current and reflects the evolving landscape
- Identify and agree some national priorities for Social Value Forums to work towards helping to give a clear sense of purpose and cohesion across Wales. Suggested priorities include:
 - Supporting the development of sustainable social value delivery models.

- Facilitating and supporting Social Value Sector engagement with the work of Regional Partnership Boards.
 - Promoting Dewis and Infoengine as key market/service information tools and encouraging providers to register/upload.
 - Supporting the rebalancing agenda and working with commissioners to identify opportunities to increase the social value delivery capacity for health and social care services.
- Formalise the role of Social Value Forum within regional structures and reporting mechanisms to the Regional Partnership Boards and out into the public, third and private sectors.
 - Review the Social Value Forum reporting template.
 - Explore the various tools to measure social value.

8. Conclusion

Social Value Forums are still forming their identity, understanding their purpose and their role in progressing social value, not only as a concept, but how that works in terms of developing social value through different governance models. The difficulty is there is confusion as to the difference between the principles of social value and what constitutes or is recognised as being a social value organisation. The difficulty arises not only around defining social value, but also in the way the definition of a social value organisation is set out in Section 16 of the Act. However, the principles of social value can be applied more broadly and are not solely within the domain of the stated new delivery models.

Collective agreement on what is meant by the term ‘social value’ is required in the first instance, but also how Social Value Forums can create the conditions to enable social value to flourish within and outside to the wider sector and with the public. Moreover, the Forums still need time to build regional connections and understand their place in forging innovation in care and support services, with social value as the keystone. Gaps and pressure points already identified regionally should be the focus to look at pioneering ways to address those gaps and pressure point in services. The core tenets of the Act need addressing more actively, aligning with the priorities set out in the Local Area Plans (i.e. align social value with the deficits and challenges at a local/regional level).

There is a need to understand how the underpinning principles of social value are translated in practice. However, there is a danger we can become too idealistic and that social value aspirations become unobtainable without being grounded in real world experiences. Alternative delivery models may deliver same or similar social value outcomes as other organisations, and here, in lies the problem and why people (public-sector) may stand back by not understanding what is meant by social value or a social value organisation and feel challenged or focus on certain aspects of social value, which may not elicit change. An authoritarian approach is not helpful, but there needs to be some form of tighter and more precise reporting; what the Social Value Forums have achieved themselves rather than examples of ‘new’ service delivery, which have been generated outside the Social Value Forums. One of the guiding principles of social value is not to over claim, but Forums need to have more of a steer as to what would be more valuable to report.

Social Value Forums need to be given the mandate to be the advocates, the supporters and the generators to spread social value. But that mandate needs to be clear as to how the Forums can drive or support change by having a more formal relationship with the Regional Partnerships Boards, so they have:

- An agreed route to make recommendations to the Boards about the types of social value-based services that could be commissioned or championed as alternatives to address the gaps in services and relieve pressures in public services.
- The key role of the Forums is to identify new ways of delivering care and support services irrespective of how they are governed which is supported by the Regional Partnerships Boards and more locally by the Public Service Boards.

There is a real and tangible opportunity to galvanise the expertise, knowledge and experience across a range of people and organisations at a regional and local level to drive forward transformation across health and social care services. Work still needs to happen to encourage people to share and co-operative and work towards a co-productive approach that involves citizens. Nonetheless, there is a danger we can become too idealistic and that social value aspirations become unobtainable without being grounded in the real world, which means that people (citizens: service users and carers) need to be the co-producers alongside professionals and organisations.

Finally, from a reporting perspective, it was felt that the report format did not enable the Forums to reflect the extent of the work regionally to promote social value. This was evident in the lack of reporting by several Forums, but understandable given the different stages in their development regionally. Reviewing the shape and state of Social Value Forums would be a useful exercise. A more rigid approach to reporting (content and timescales to report) may be not helpful or well-received, but there does need to be agreement before the next reporting period as to what level of data is required and from whom, so people and organisations know what to collect, to what extent social value is to be measured, and to know how the data will be used.

9. References

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Table 1. Analysis of the Regional Social Value Forum Reports: Themes and findings

Main Themes	Main findings
Establishing SVFs	<ul style="list-style-type: none"> • Differing starting points which dictated the pace and how SVF developed. • Using other existing fora or groups as the starting point. This may have hindered how those SVF developed. • Differing titles (Innovation Forums, Provider Forum, rather than SVF). • Range of facilitation and logistical support. • Varied understanding the role of SVFs. • Difference between social value and social impact not understood. • Varied membership, in some cases over 90 third sector organisations involved in others membership not provided. • Engagement exercises conducted to inform the development of SVFs regionally. • Terms of Reference (those submitted) are similar and set out the role SVFs play in the development of 'Section 16 care and support services which could contribute to the prevention and early intervention agenda outlined in <i>A Healthier Wales</i>. • Some Terms of Reference set out that the SVF would involve people who are provided with care and support or preventative services in the design of and delivery of a provision. It is unclear how that will happen, and if indeed it does or will do.
Function of SVFs	<ul style="list-style-type: none"> • Various means of communication to the wider social value corpus (including via email), but not consistent and difficult to assess how wide it reaches. • A learning and sharing environment. • Focus on specific key principles of the Act or subjects • A vehicle for: <ul style="list-style-type: none"> - Partnership working - Advocators of co-production; leading by example - Open to all providers - Consortium approach and opportunities - Share resources - Make recommendations to the RPB • Steer social value and the development of social value organisations, linking into a variety of autonomous groups at local authority area level. • At least. meet quarterly. • Support local project initiatives and share learning. • Personal and individual issues should be '<i>directed to appropriate resolution</i>' (e.g. commissioning issues) and is the not the role of the SVF to deal with. • Identify social value champions.
Understanding the principles of Social Value	<ul style="list-style-type: none"> • Need for a shared understanding of Social Value. • Usefulness of the toolkit, but not wholly felt by all SVFs, with one SVF having developed a toolkit for commissioners, procurers and providers. • Common agreement on definition. • Difference between social value and social impact not understood.

<p>Engaging with stakeholders</p>	<ul style="list-style-type: none"> • Making social value <i>'everyone's business'</i>. • Representative of the wider social value sector. • Open to any provider across the social value sector. • Third sector organisations involved in developing terms of reference for SVFs. • Has improved understanding and co-operation across providers. • Linking in to other third sector networks. • SVFs should be owned and directed by social value organisations and service users. • Mechanisms in place via CVCs to communicate out to the wider sector. • Mechanisms to align with and interact with Citizen Panels, but confusion which citizen panels, local authority or regional or both? • More input and support from Transformation Teams to develop new service models.
<p>Understanding the role of Social Value organisations</p>	<ul style="list-style-type: none"> • Opportunities to share good practice. • Cultivate innovation for future care and support services. • Sector growth. • Engagement across sectors. • Setting priorities. • Shared understanding of what constitutes a social value organisation. • Section 16 duty ambiguous and the toolkit not being used.
<p>Other key findings</p>	
<p>Impact</p> <p>Lack of evidence on impact and too early for SVFs to ascertain. Most provided a short summary of activity (e.g. workshop sessions on specific aspects of the key principles)</p>	<p>Integration:</p> <ul style="list-style-type: none"> • Improve understanding and co-operation across providers. • Link for information exchange across organisations. • Sharing professional practice and ideas to promote integrative thinking and action. <p>Prevention:</p> <ul style="list-style-type: none"> • Development of local social prescribing models. <p>Voice and involvement:</p> <ul style="list-style-type: none"> • Open and constructive dialogue <p>Long-term planning:</p> <ul style="list-style-type: none"> • Agreed working relationship with Public Service Boards, but unclear as to how that happens. • Use of the Transformation Fund to invest in community-based services. <p>Co-production:</p> <ul style="list-style-type: none"> • Lack of clarity as to what level. Appears to be more on an organisational level (e.g. drafting terms of reference for SVFs) or within various boards and networks rather than with citizens; users of care and support services. • Some SVF engaged with the Co-Production Network to embed principles of co-production. • Some indication that co-production steering groups are being set up so social value organisations can influence the agenda, but lack of clarity as to how they will be co-producing with citizens, the users and carers of services.
<p>What the social value sector says</p>	<ul style="list-style-type: none"> • Sector may be confused by a range of terms used by policy makers to describe social value and what is a social value organisation. • Lack of involvement and co-production at all levels with citizens leads to poor service design and delivery. • Lack of investment in community and third sector organisations. • Lack of equality in decision-making

	<ul style="list-style-type: none"> • Sector organisations may not identify themselves as a) a social value organisation, b) using the term ‘social value organisation’ or c) know what social value means, especially citizens. • Inconsistent attendance at SVF meetings. • Measuring social value through SROI, but not consistently applied. • Training Social Value Champions helpful. • Encouraged partnership working across voluntary and private sectors. • Opportunity to contribute to new models of care. • SVFs are a place to foster inclusiveness, trust, openness and transparency. • Driven by what RPBs want from the SVF rather than the agenda being driven by members of the SVF • Lack of an innovative and creative agenda and reactive to the RPB agenda. • Information receiver rather than initiating innovation in social value. • Lack resources (e.g. a budget) to commission or test out new models of service delivery • Not solution-focused, too much of a ‘talking shop’ rather than doers. • Strengthened working relationships between providers and statutory bodies. • A vehicle to explore mutual interest. • Development of information sharing sessions have been useful, particularly topic specific sessions such as GDPR, safeguarding, learning disabilities. • Been a ‘<i>slow gestation period</i>’. • Less regimented agendas with numerous standing items. • Sector wanting more tangibles to set up task and finish groups and to pilot/test out new models without the need to fund external consultants.
<p>What the RPBs and statutory partners say</p> <p>Note:</p> <ul style="list-style-type: none"> • Representation from SVF on the RPBs, but variable across the SVFs as to who represents the SVF • RPB supported the development of the SVF, but it is unclear as to how the RPBs use the SVFs as developers of innovative models 	<ul style="list-style-type: none"> • ‘<i>Sounding board</i>’ for the health and social care sector. • A mechanism to consider ICF proposals (not universal). • Need to understand multiple perspectives. • Developed a partnership approach. • A place to share views and concerns on common issues • ‘<i>Reciprocal feedback</i>’ mechanism between the SVF and the RPB. • A place to implement and use the principles of co-production. • Work collaboratively with the SVF to develop and deliver care and support services. • Concerns that private/commercial providers may not have the opportunity to contribute to SVFs. • The need to closely align RPB and PSB activities which promote the ‘<i>development of community assets and resilient communities</i>’. • Develop the foundational economy. • Flexibility in commissioning social value organisations. • Need RPBs to fully support the SVFs in terms of resources and mandate.
<p>Aspirations for the future</p>	<ul style="list-style-type: none"> • Provide a dedicated resource to SVFs to develop social value initiatives driven by the SVFs. • Further develop the role of the SVF, with responsibilities clearly outlined. • Delivering on the priorities set out in Local Area Plans, but not restricted by them as gaps emerge. • Link to the Information, Advice and Assistance offer. • Identify the regional priorities to take forward. • Embed social value in procurement processes. • Adopt SROI to measure impact on a regional basis. • Provide feedback to RPB. • Regional workshops. • Map current engagement practices within key population groups • Build a framework to support future engagement practice across the RPB.

Role of the Welsh Government and other support agencies

- To provide terms to define:
 - ‘the sector’, outlined in Section 16
 - Social value
 - Social value organisations (interchangeable: third sector, voluntary sector, not-for-profit)
 - Social Value sector
- Term and expectation of SVF
- Set out how and the degree to which social value is to be measured.
- Where Social Value Forums sit within current governance arrangements.
- How the SVF reports will be shared.
- Provide technical advice and support about flexible procurement options and how social value could be scored in the procurement process.
- Highlight what needs to be reported on early in the process
- Ring-fenced funding for SVFs through CVCs and funding for citizens to become involved.
- Awareness raising of the profile of social value.
- Create a learning centre for social value.
- Fund SVF membership to Social Value UK.
- Learn from other SVFs and good practice to support the social value agenda.

Table 2. Quantitative data

Social Value Forum	Value/ Percentage ICF	Grants/ contracts	Health and social care contract (not-for-profit)	No. of projects established/ delivered	No. time SVF has met	No. of social value organisations	No. of known & type social value organisations delivering and social care
Gwent	10%*	No information	19,993,917*	1†	28	140+	3-5 social enterprises
West Wales	No info	No information	No information	No information	0	No information	No information
Western Bay	Revenue: 841,317 (9%) Capital: 835,156 (16%)	639,274 (R) 835,156 (C) 149,508 (small grants)	No breakdown given	0	2	No information	No information
Cardiff and the Vale of Glamorgan ▲	627,500 (11%)	No information	No information	0	6	4272 Cardiff 3062 Vale	No information
North Wales	1,286,505 (4 out of 5 county data)♦ Ynys Mon: 9.92% Gwynedd: 6.82% Wrexham: 14.62% Conwy: 11% (2 out of the no data provided)	Two counties provided data♦ 6,417,688 (YM) 1,792,860 (Flintshire) 3.6m (BCUHB)	Ynys Mon♦: 6,637,688 Flintshire♦: 1,792,860 Conwy (17/18 data Families First only: 393.000)	30◇	14	9178	30 (SROI)◇ 13 (Flintshire: asset transfer)☆ 3 alternative delivery models☆
Powys	No information	No information	No information	No information	3	4100	No information
Cwm Taf Morgannwg	No information	No information	No information	No information	0	No information	No information

*No value given

†Established by the previous provider group

*Across 5 local authorities, ABUHB and 118 contracts from Supporting People to 47 providers

▲1 social value capacity building product developed (Social Value Toolkit)

◇Pre-dates the establishment of the SVF, funded by the Big Lottery Fund

♦2018/19 data

☆Not clear that both have generated directly from the SVF