



Greater Manchester  
**Social Value Network**

# Good Practice in Social Value Partnerships

**A guideline for how to forge successful local partnerships between private and voluntary sectors**

*April 2020*



ARUP



## Introduction

One in five UK businesses has a social mission at its heart, and in 2015 our ‘social economy’ was valued at £55 billion.<sup>1</sup> The government has increased its social investment over the last ten years, and recent polls show that over 50% of graduates are selecting employers that have a strong focus on social value.<sup>2</sup>

*Social Value is an umbrella term used for the broader positive effects that public and private sector organisations create. It could be social and/or environmental, and it could have an immediate and/or a long-term impact on individuals, communities and wider societies.*

We believe that social value initiatives are most successful when there is a strong partnership between private and voluntary sector organisations. When exploring this hypothesis, we struggled to find guidance on how to foster and/or broker these relationships on a local level.

On the 13<sup>th</sup> March 2020 a diverse group of charities, businesses, and brokerage bodies met to collectively create a prioritised good practice list based on their experiences of social value projects. This document is the outcome of that event, and we hope that this guideline will:

1. Provide useful information for people looking to establish cross sector relationships
2. Improve the quality and efficacy of social value partnerships
3. Help to maximise meaningful outcomes from social value projects

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<sup>1</sup> [www.britishcouncil.org/society/social-enterprise/news-events/news-social-economy-great-success-story](http://www.britishcouncil.org/society/social-enterprise/news-events/news-social-economy-great-success-story)

<sup>2</sup> [www.gov.uk/government/collections/social-investment#social-investment-and-the-social-sector](http://www.gov.uk/government/collections/social-investment#social-investment-and-the-social-sector)

***This report was compiled by Nigel Rose from MACC & GMSVN and Dee Lowry from the Manchester Homelessness Partnership. The content was created by the thirteen participants who shared their experiences, provided invaluable information at the event, and provided input into the document. We would like to thank everyone who gave their time to this project.***

# Good Practice Guidelines

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## Top priorities

The organisations at the social value good practice event voted on three criteria that should be prioritised for a successful private/voluntary sector partnership. Creating long-term relationships won by a large margin.

### 1) Create long-term relationships

- Charities and businesses both want to forge lasting relationships with their partners that can evolve and progress. Partnerships tend to become more productive as the organisations understand each other better. A good relationship that develops over time will create more opportunities and options for both partners.
- Societal change takes time! It is often difficult to demonstrate meaningful impact in a single year – investing in longer-term relationships allows initiatives to address deeper needs and root causes.
- However, this focus on long-term relationships shouldn't preclude 'quick wins' where a private sector organisation responds to a clear and timebound ask or makes a very specific offer that they know is likely to be wanted by voluntary sector organisations.

#### **Case study – Allied London commitment to Big Change MCR**

*Allied London have supported Big Change MCR for over four years and are dedicated to continuing to contribute to this initiative. Their involvement has grown with the needs of the project – starting with a focus on fundraising, then using their networks to increase promotion, and more recently providing the salary for a new Big Change employee. Allied London also sit on the Big Change Steering Group and panel where they use their expertise to guide the initiative where appropriate. It is clear how invested they are, and the security which comes from having their long-term commitment has been massively beneficial for Big Change partners.*

### 2) Focus on the cause – respond to needs and educate!

- Social value initiatives should put the cause before anything else. All organisations wanted partnerships that address real needs, and you will need to keep bringing your focus back to that core reason. The private sector organisation has to feel confident that their time and energy will make a significant difference, and the voluntary sector partner should use their knowledge to explain why that 'need' was chosen.
- This can also be seen an opportunity for the charity to raise awareness about their cause and for employees of the private sector organisation to gain learning and development opportunities.

#### **Case study – Lloyds Bank open accounts for people who are homeless**

*Lloyds Bank wanted to work with charities to support people who are homeless and learnt that a huge need is the ability to open a bank account. Lloyds Bank held workshops with charity partners and with people who are homeless to understand the barriers to opening accounts (from both sides) and designed a flexible pilot. They built equal partnerships with two charities to test and improve processes and then expanded the scheme. They opened 154 bank accounts in the first eight months and are using their influence to encourage other banks to do the same. They have also raised issues such as 'ID for vulnerable customers' with regulatory bodies ACCU and UK Finance.*

### 3) Set clear and realistic goals

- Both sectors agreed that it is essential to have an early conversation around the scale and scope of any social value initiatives so that realistic goals and expectations can be set. This means the voluntary sector partner not putting any unintentional pressure on the business, and the private sector partner not over-promising on what they can deliver.

- This process should include a thorough discussion on how the objectives will be delivered and what resources will be required. The project should only move forward when an achievable (yet flexible) plan is in place that everyone involved is happy with.

## Forming relationships

### Get to know each other

It is essential to take time to get to know each other as people and as organisations before jumping into any sort of pitch or project design. Developing a deeper understanding can allow for more honest conversations and can facilitate the negotiation of any future issues. When partners feel understood they are also more likely to be understanding of setbacks, and braver with saying no, asking difficult questions or posing respectful challenges.

### Find a good fit of culture and values

Each organisation has its own style. Partners can act most effectively together if they share values, share similar viewpoints, or share ways of working. A mismatch in any of these can cause problems in a relationship.

### Find a good match of expertise and skills

The private sector organisation has to have skills and expertise that are useful to the voluntary sector organisation and the voluntary sector organisation has to have the skills and expertise about the cause and to have some clear initial ideas about how the private sector organisation might be able to assist. When a need is perfectly met with an offer, real impact can happen quickly.

### Put the agreement in writing

Once relationships have been developed and realistic goals have been set, it may be useful to put this on paper. In some instances, this might be a contractual document, or it could be a 'partnership agreement', or simply an outline of what both parties are committing to. Documenting a partnership ensures that any project work has been thought through, and it can be a gentle way of holding organisations to account. It may help to get more senior people in both organisations to sign it, so they know what is planned and are "bought in".

## Maintaining relationships

### Keep regular communication

Once a partnership is established and work is underway, it is essential to maintain regular, open communication. This may include scheduling progress meetings (where both organisations feed into the agenda), having informal calls or meet-ups, or simply sharing information via email. Letting each other know of any current or upcoming issues/delays and sharing success stories can help keep a sense of togetherness. It is helpful to have agreed contact points for any queries/support needs, and an outline of the people in both teams and their role.

### Build wider support within organisations and networks

Be proud of your work and your partnerships and share this enthusiastically within your organisations. You may have passionate colleagues who want to get involved. For larger charities and businesses, make sure to engage any comms colleagues early on and add your social value project to an internal bulletin or newsletter. Think about how to get 'buy-in' from senior members of staff and look at other avenues to promote your work externally (e.g. GMSVN or Macc).

### **Creativity and flexibility are essential**

There is an adage in the voluntary sector - if something is simple it isn't real! Nothing stays the same and the needs and priorities of a charity (particularly a smaller one) can change for both internal and external reasons. Projects that are designed to be open and flexible are usually more successful and respond to the real needs of the sector.

### **Deliver and measure tangible and meaningful impact**

The best way of creating a strong relationship is to work together to make a change that both organisations see as a 'win'. Whilst being flexible, try to deliver tangible impact. Partners need to balance the investment in building relationships with the importance of getting things done. Having some more easily achievable milestones in the short-term can also help to maintain motivation and engagement.

Give time to collecting and sharing impact stories as you go (not just at the end of a project). It's likely that both partners are collecting information on their activities so sharing these reports can improve efficiency and thoroughness.

### **Create reciprocal relationships with mutual respect**

Approach the whole process as equals and have shared leadership. Ensure that any extra workload which is put on either organisation is acknowledged and appreciated. Feel able to say what you do and don't want to do and make every effort to follow through on commitments.

### **Ending partnerships**

#### **Build sustainability into design**

Think about longevity from the outset. Try to create projects or initiatives that won't cause any harm or distress to the beneficiaries if the activities (for example) were to stop. Have a plan in place for the continuation of work or the handover of information, learning and assets.

#### **Create a legacy and celebrate!**

Think about what your project will leave behind and what it will continue to communicate to those who follow. Consider what this means for your reputation. Make time to jointly celebrate your achievements.

#### **Introduce to your network**

Often when a short or long-term partnership is coming to an end there is still a lot of potential to progress the social value initiative that was created, and it is more resource intensive to start from scratch. If possible, try to ignore or bypass any obstacles created by being in competition and make introductions within your respective networks to allow good work to continue and to be built on. Organisations are much more likely to work with someone who has been recommended to them.

### Private sector organisations' hopes

|                       |                         |                     |
|-----------------------|-------------------------|---------------------|
| Measurable outcomes   | Regular updates         | Staff engagement    |
| Senior buy-in         | Learning opportunities  | Meet real needs     |
| Clear objectives/ask  | Project management      | Strategic/brand fit |
| Lasting relationships | Charity cause knowledge |                     |

### Voluntary sector organisations' hopes

|                      |                          |                   |
|----------------------|--------------------------|-------------------|
| Long-term support    | Business expertise       | Reciprocity       |
| A 'cultural' match   | Useful support (needs)   | Links to networks |
| Financial support    | Matching opportunities   | Realistic offers  |
| Delivery on promises | Timely/flexible projects |                   |

### Brokerage

Many successful private-to-voluntary sector partnerships involve a broker who may introduce organisations and provide guidance for their joint social value initiative. In procurement exercises this could be a representative from the local authority, or it may be a voluntary sector support body such as MACC. These roles can play an important part in the success of the partnership. Below are a few brief ideas on how to be an effective broker.

- Be independent / neutral
- Be public facing – meet partners face-to-face where possible
- Encourage organisations to create procurement processes that encourage partnership working
- Avoid duplication of effort and coordinate offers
- Understand and focus on sectoral needs
- Build diverse relationships and don't forget about smaller organisations
- Create spaces where cross-sector partners can meet
- Provide support and guidance but not become responsible for delivery
- Ensure the partners 'own' the relationship
- Be useful! Don't add another layer to either parties workload or reporting requirements
- Ask questions that partners may be hesitant to bring up
- Mediate any disputes quickly and sensitively
- Introduce coproduction where possible
- Highlight projects with innovative approaches and real impact (not just good Comms)

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