



Directory of Social Impact Bond (SIB) Providers

This Directory provides summary details for a range of organisations that have engaged in providing technical support and related advice to applicants to the Commissioning Better Outcomes Fund and that have indicated an interest in supporting applicants to the Life Chances Fund and other SIB related funds.

The information in this directory has been compiled by the Big Lottery Fund for your advice. Information for each entry has been provided by the organisation in question.

This advice does not represent any recommendation by the Fund or the Life Chances Fund to select one or more of the technical support provider(s) listed in the directory, as opposed to one or more technical support provider(s) not included in this directory.

We strongly suggest you undertake a skills audit to ascertain need and obtain independent advice in procuring any technical support providers.

This directory was last updated in July 2017.

Directory of SIB Service Providers Index

Please carefully consider issues relating to conflict of interest and the effect on your procurement processes for your SIB when choosing an investor. As referenced in programme Q&As neither Commissioning Better Outcomes nor the Life Chances Fund will allow CBO/LCF development funding to pay for activities by an organisation that may then invest in the resulting proposition, either directly or via a fund they manage.

Aleron

Angier Griffin

Atlantic Customer Solutions

ATQ

Bates Wells and Braithwaite LLP

betteroutcomesbettervalue.org

Bevan Brittan LLP

Bidright UK

Bircham Dyson Bell

ClearlySo

Cogent Ventures Limited

Centre for Strategy and Evaluation Services

Eastside Primetimers

Ecorys UK

Eight Ninths Ltd

Firstcare Consultancy Ltd

Future Public

Gecko Programmes Ltd

Hogan Lovells International LLP

I for Change

ICF International

Kai-zen Global Business Services

Muckle Solicitors

Mutual Ventures

Numbers For Good

OPM Group

PricewaterhouseCoopers LLP UK (PwC)

Pro Bono Economics

RedQuadrant

SafeLives (formerly CAADA)

The Young Foundation

Tim Davies-Pugh

Triodos Bank

The following organisations also appear in the Fund's Directory of SIB Investors.

Northstar Ventures

Social Finance

SUMMARY INFORMATION

Aleron

Aleron is a social impact consultancy that supports charities, social enterprises, commissioners, and investors to achieve greater impact and efficiency. Using detailed data analysis, it supports organisations to develop and embed organisational strategy, generate sustainable income, diversify their service offer, measure their impact and drive decision-making through performance reporting and performance management. With a focus on getting organisations ‘impact and investment ready’, Aleron have delivered a range of projects through the Impact Readiness Fund and Big Potential Advanced Fund, the Commissioning for Better Outcomes Fund and the Life Chances Fund. In addition to its modelling and advisory services, Aleron has access to a network of social investors.

Service areas:

- Advice and support for initial scoping and opportunity identification
- Detailed feasibility study including identification of outcomes and interventions
- Full financial and business case development
- Development of outcomes-based contracting including social impact bonds and other social investment approaches
- Service design and consortium development
- Investor and provider engagement and consultation.

Policy area: Housing, homelessness, children’s social care, adult social care, medical research, health & wellbeing, criminal justice, and education, training & employment.

Previous experience with SIBs:

- Developed the economic and financial model for a social impact bond to improve service response for chronic substance misusers in South Tyneside Council and supported the development of an application to the Life Chances Fund.
- Conducted a feasibility assessment for a national social care charity of seven local integrated care services to support their development into social impact bonds.
- Commissioned to develop the financial model for a social impact bond targeted at transforming domiciliary care in Halton Borough Council.
- Developed a strategy for a SIB run by a large children’s social care provider.
- Provided workshops and advice on Social Investment Strategy and how SIBs can drive sustainable income.
- Senior staff have developed SIBs in previous roles within service providers.

Contact details:

Nicolas Ponset, CEO: nicolas.ponset@alerongroup.com Tel: 0207 2397900

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Angier Griffin

Service area:

- Consulting & Financial Modelling

Previous experience with SIBs:

Angier Griffin has been active in the field of social value measurement and social finance for more than 20 years. Founder and principal, Philip Angier, was part of the project team which brought Ways to Wellness (www.ways-to-wellness.org.uk), the UK's first health SIB, to fruition, taking a lead role in financial modelling and contract design.

Philip, working with other North East associates, has delivered investment readiness support and financial modelling services to a number of social economy organisations in the North East.

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Atlantic Customer Solutions

As a boutique consultancy with a speciality in Health and Social Care, we have significant experience relevant to the specification and delivery of Outcome Based Services. From a range of backgrounds, including MBA degrees in Corporate Finance (Doug Sheperdigian) and with several Chartered Public accountants on our team we are well equipped to **understand the intricacies and financial risks** inherent in Social Impact Bonds.

- We are **facilitating National thinking** about Outcome Based Commissioning (OBC), as evidenced in our Cambridge workshop series 8 workshops so far, conducted over the last 4 years and attended by over 50 commissioning authorities in Health and Care from around the country.
- We have **engaged with many Providers** on OBC and payment by results and understand the changes they believe will ensure success.
- For over five years we have worked with the Royal Borough of Windsor and Maidenhead to explore the concept of an outcome based homecare service **through to implementation**, completed in 2016.
- We have worked with a number of authorities in our Cambridge-based **Outcome based Commissioning Master classes**, including London Boroughs of Islington, Haringey, Greenwich and Newham.
- We are **often asked to speak** on the topic of outcome based commissioning. Recent engagements include: UKHCA national conference, Health+Care 2017, TLAP National Markets.

Service areas:

We have delivered advice and engagement programmes on implementation of outcome Based services to councils such as the Royal Borough of Greenwich, Warwickshire County Council, Staffordshire, Worcestershire, and Croydon. This work has involved engaging providers, service users/patients, and carer staff.

- We have **developed generic models** to establish the value for a given authority depending on its population and services.
- Our clients continually rate us highly for **working inclusively** with their staff.
- We bring **commercial skills** - management of major procurements, outsourcing and payment by results in the private sector.
- Our **workshops are state of the art** - as evidenced through working with clients such as Shell GameChanger.

Contact details:

www.atl-cs.com

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ATQ Consultants Ltd

ATQ Consultants is one of the leading providers of advisory support in the development of Social Impact Bonds, helping commissioners, service providers and investors address the challenges of outcomes-based contracting, payment by results and SIBs since 2010. We are ATQ because we always aim to “answer the question” put by our clients. We focus on working with commissioners and providers and have supported commissioners at all stages of SIB development from pre-feasibility assessment to hands-on procurement support. We also work with VCSE providers to develop specific SIBs, including commissioner and investor engagement.

For further details of services and projects, visit us at www.atqconsultants.co.uk.

Service area:

- Advice and support to initial scoping and opportunity identification
- Detailed feasibility studies including identification of outcomes and interventions and operational design
- Full financial and business case development
- Investor engagement and consultation
- Procurement strategy development and implementation

Policy area: Children’s services, family intervention, employability and skills, criminal justice and offender rehabilitation, drugs and alcohol, physical health, mental health, adults and children with learning difficulties, homelessness and rough sleeping, dementia and older people’s care.

Previous experience with SIBs:

We have undertaken over 20 SIB projects, working with more than 30 lead commissioners, numerous potential co-commissioners, a wide range of VCSE providers from large national charities to small local specialists, and most of the leading social investors. Our projects have been funded both directly by clients and by the Life Chances and Commissioning Better Outcomes Funds. We have supported a number of clients to apply successfully to the CBO Fund and more to apply to LCF, with decisions pending. Several of our projects have led to successful SIB implementation, most recently (July 2017) in North Somerset where we helped the Council develop a SIB to support families with children in/at risk of entering care, enabling reunification or the avoidance of care.

In addition to our project work, we also partner Ecorys UK in evaluating the CBO Fund for the Big Lottery Fund. Involvement in this evaluation significantly benefits our SIB clients because through it we are able to share learning gained from evaluation of a much wider range of SIBs beyond those that we have directly supported.

Contact details:

| | | |
|------------------|--|-------------------|
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| Eileen Robinson: | eileen@atqconsultants.co.uk | Tel. 07830 849015 |

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Bates Wells and Braithwaite London LLP

BWB work closely with all the main stakeholders involved in social impact bonds. We advise public authorities, particularly around delivery of social value through commissioning of public services. We act for more charities and social enterprises than any other law firm in the UK, understanding and helping them function effectively within the legal, financial and operational constraints they face. We advise many social investors and are active in helping grow the social investment market place. We use this 360 degree perspective to provide informed advice to our clients and to help deliver SIB related projects.

Service area:

- Legal advice (covering procurement, finance and investment, contracting and project governance)
- Impact measurement (research into outcomes, impacts, theories of change, values brought to stakeholders)
- Project and service development (market analysis, spanning new models for pricing and delivery that suit increasingly outcomes-focused commissioning)
- Financial advisory (planning, funding and fund-raising, spanning conventional and social investment markets, inc. social investment bonds and social impact bonds)

Policy area: Children and young people, education, families, health and social care, rehabilitation services, homelessness

Previous experience with SIBs:

We were the lead advisors on the Adoption SIB, which closed in August 2013. This contains some novel characteristics that potentially enable SIBs to operate at a local level but on a national scale, as providers and commissioners can join the scheme over time and make spot purchases of services using the model established by the core participants.

We drafted the template SIB contract and accompanying guidance promoted by the Cabinet Office Centre for SIBs. This involved considering the approach taken on SIB contracts signed to date and also a look forward, including consultation with representative groups, to what a scaled up SIB market may require. The contract and guidance are designed to be compatible with a range of SIB related structures.

We have advised investors into SIB projects since the first SIB at HMP Peterborough, including on the project documentation, structures and investment terms, and service providers on programmes such as Fair Chance Fund and Youth Engagement SIB.

Contact details:

| | | |
|-----------------|--|--------------------|
| David Hunter: | d.hunter@bwblp.com | Tel: 02075517684 |
| Chris Theobald: | c.theobald@bwblp.com | Tel: 0207 551 7861 |
| Luke Fletcher: | l.fletcher@bwblp.com | Tel: 0207 551 7788 |

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betteroutcomesbettervalue.org

Previous experience with SIBs:

betteroutcomesbettervalue.org is a free service available to local commissioners who are interested in launching a SIB or outcomes contract. It was created to help local commissioners access information, contacts and lessons learned from 19 SIBs in the UK, which are being delivered by 33 charities and social enterprises, for 39 different entities paying for outcomes. These include central government departments, local authorities, NHS Trusts and CCGs, schools, universities, and also philanthropic outcome payors.

The betteroutcomesbettervalue.org team can offer detailed descriptions of the payment mechanism, contracting structure, providers, commissioners, policy areas, results achieved and lessons learned from each of these projects.

This a free service to offer information widely in the interests of transparency and peer-learning. We can also make direct introductions to any of the organisations we work with.

This free provision is associated with Bridges Social Sector Funds, who are listed in our Investors Directory. betteroutcomesbettervalue.org do not accept development grants or payment from commissioners for making this information available.

Contact details:

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Bevan Brittan

Bevan Brittan has extensive experience in the social finance sector, acting for public sector body commissioners and investors.

Previous experience with SIBs:

- Social Impact Bonds - advising Essex County Council, Greater London Authority, Manchester City Council, four authorities in South West, Home Group and St Mungos on implementation of SIBs relating to homelessness, children at edge of care and NEETs;
- Investment Funds - advising investors on investment into £6m fund, jointly established with Big Society Capital to provide small (sub-£250k) loans to VCSE in specified regions, focused on innovation in health & social care sector;
- Structuring Outcome Commissioning Projects - advising Sandwell and West Midlands CCG on structuring an outcome commissioning project using social finance focused on end of life care: advising four local authorities on 'LIST' concept as a means of creating a common purse across the public sector, to facilitate greater scale of early intervention opportunities.

Contact details:

Matthew Waters, Partner for Bevan Brittan LLP - Lawyers for the public, private and third sectors:

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Bidright UK

Bidright UK is an Approved Provider of the Social Investment Business' £10m Investment and Contract Readiness Fund. We supported twelve ventures develop and implement successful proposals for this fund.

We have over 20 consultants with expertise across all areas of contract/ investment readiness including finance, investment, marketing, project design, social impact measurement, bid-writing, consortium-building, contract implementation/ management. We have specialist consultants for: health; young people; families; offenders. Funding streams we work with include: SFA, Local Authority, Department of Work and Pensions, ESF, Department of Health, Ministry of Justice, ERDF, Big Lottery.

We have designed winning £multi-million Payment by Results projects.

Service area:

- Bid and proposal writing;
- Project design and implementation.

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

We have devised proposals using social impact bonds and attracted inward investment from private investors.

Contact details:

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Bircham Dyson Bell

We help charities, philanthropists and impact investors aiming to procure a social return where capital is deployed, to seek both positive social outcomes and financial returns. We help social enterprises navigate the legal and regulatory obstacles of this emerging market and satisfy the demands of funders when looking to raise finance in new ways such as social impact bonds. As public bodies increasingly move away from grants to using contracts where services are commissioned or purchased, we can help organisations manage the often complex tax implications which may be involved.

Previous experience with SIBs:

We work with social impact businesses to enable them to be more strategic in their operations and business planning, from the early stages of formation, through scale up, fundraising and roll out to maturity and also at times when unforeseen circumstances need to be managed.

We are familiar with the ways in which SIBs may be structured and are well placed to advise on the best approach, in line with the expectations of commissioners, investors and providers. We are working with a number of investors concerning how they may engage with new SIB opportunities.

Contact details:

<https://www.bdb-law.co.uk/>

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ClearlySo

ClearlySo is a financial intermediary, advising impact-centred organisations on raising capital. We work exclusively with high-impact businesses, charities and funds. We support their growth through financial advisory work and introduce them to institutional and individual investors who share their objectives and values. We see social impact bonds as an important way for charities and businesses (especially social enterprises) to grow and scale.

Service area:

- Developing operating models;
- Financial modelling;
- Business case development;
- Defining strategic objectives;
- Structuring and raising finance for social impact bonds;
- Investor matching (individual and institutional);
- We are one of the leading Investment readiness providers in the UK, and have helped our clients raise over £59m of impact investment to date.

Previous experience with SIBs:

ClearlySo worked with a number of bidders for the recent DWP Youth Engagement Fund contracts. As part of this process, we leveraged our experience gained through closing 58 transactions in the impact investment space, across sectors such as Health and Social Care, Education and Early Years. Since Big Society Capital invested in us in 2013, as one of their first investments into the sector, we have developed an extensive network of investors, from foundation and trust, to angel investors and impact funds as well as pension funds and city councils.

We are currently working with a number of organisations, putting together social impact bonds in the youth unemployment space.

Contact details:

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Cogent Ventures Limited

Cogent Ventures are specialist health and social care business advisors. Our Commissioning Support and Corporate Finance teams can support Clinical Commissioning Groups in the development of SIBs in the following ways:

- Data analysis and stakeholder engagement;
- Outcome definition;
- Interventions concept design;
- Investor engagement;
- Financial modeling and Value for Money assessments;
- Programme and SIB structure design;
- Procurement support;
- SIB contract development;
- Performance management system.

Service area:

- Deal brokerage;
- Feasibility studies;
- PbR contracting mechanisms;
- Negotiation support;
- Investment raising;
- Commercial aspects of SIB structure and SPV development;
- Performance management systems support.

Policy area: Health and social care

Previous experience with SIBs:

Our commissioning support team have a great deal of experience developing PbR contracting mechanisms for the NHS and Joint Commissioning Units. We are also currently exploring the potential for a number of health and social care Social Impact Bonds, aimed at areas such as reducing length of stay at acute hospitals, better wound care management and home based palliative care.

Location:

North West, North East, Yorkshire and the Humber, West Midlands, East Midlands

Contact details:

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Centre for Strategy and Evaluation Services (CSES)

CSES was founded in 1999. We undertake all types of evaluation work (ex-ante, interim or mid-term, ex-post...) and have expertise in the use of a broad range of evaluation methods and tools including project and programme evaluation, policy evaluation, evaluation of organisations, and evaluation of legislation. We also undertake impact assessments to help develop new programmes and policies, feasibility studies (e.g. in regional development field), and assignments to review and improve the performance of organisations.

CSES has undertaken an extensive range of work in the UK, the rest of Europe and other international markets. Our clients include the UK Government, the NHS, the European Commission, European Parliament, EU Agencies, the European Investment Bank, the Committee of the Regions, the European Economic Area, and international clients such as the European Science Foundation, the United Nations and the World Bank. We also work locally in the UK. For example, we have recently completed an assignment to prepare a community-led development strategy for a sea-side town and before that helped to prepare a Big Lottery application for a project in Kent.

We have particular expertise in supporting clients with studies on entrepreneurship and access to finance, education and culture, research and innovation, including social innovation and innovation in urban areas. We have worked for several charitable entities as well as local authorities and public-private sector partnerships. Our local work has been undertaken in the South East, East of England, North West, Wales and other UK regions.

Location: National

Service area: Research and evaluation; consultancy

Policy area: Entrepreneurship and access to finance, industrial policy, investment promotion, education and culture, research and innovation, justice and home affairs, regional development

Previous experience with SIBs: CSES has experience evaluating all types of financial instruments. For example, in the context of work to develop a community-led development strategy for a sea-side town we reviewed the availability of funding (including social bonds) for social enterprises; similarly, we examined the use of social bonds and other types of financing to promote social innovation in a project for the European Commission covering 10 EU Member States.

Contact details:

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Eastside Primetimers

Eastside Primetimers is a management consultancy with a difference. Working with not-for-profits, we provide professional support for CEOs and Boards seeking to transform their organisations to be fit for the future. We are an approved provider for a number of investment readiness and impact funds that allow social organisations to access support, raise investment and grow through winning new service delivery contracts. With a success rate of 80%, we have helped all types of charity clients to secure investment and contracts totalling more than £70 million.

Previous experience with SIBs:

We have strong expertise with social investment products including all parts of the process for developing SIBs and outcomes-based contracts. This includes: i) service modelling and consortium building - we were one of the initiators behind 3SC, giving structuring advice and engaging prospective partners; ii) investor relations - we work closely with social investors and mainstream banks to put together packages which fund growth for social organisations; iii) outcomes measurement - we are a leading advisor in this area and have helped organisations such as Health for Living and Tree Shepherd develop the tools for measuring and reporting their social impact.

Regions we operate in: South West, South East, East of England, London, East and West Midlands, North West, North East, Yorkshire & Humber

Service area:

- Financial modelling;
- Outcomes modelling;
- Deal structuring;
- Investor relations;
- Service design and partnership building;
- Outcomes measurement.

Policy area: Any

Contact details:

www.ep-uk.org

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Elliot Bidgood: elliott@ep-uk.org Tel: 020 7250 8440

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Ecorys UK

Ecorys undertakes policy research, evaluation and technical assistance support for central government, local public bodies and voluntary and community sector organisations, covering all aspects of economic and social policy. We are able to support organisations in evaluating SIBs, including process evaluations, impact evaluations (including counterfactuals) and Cost Benefit Analysis.

We can apply our expertise to support setting up some aspects of SIBs, including developing outcomes frameworks and cost saving models. We have a good track record evaluating the process and impact of SIBs and delivering the Commissioning Better Outcomes Evaluation for Big Lottery Fund, through which we are evaluating 35 SIBs.

Previous experience with SIBs:

We are currently evaluating the Commissioning Better Outcomes (CBO) Fund for the Big Lottery Fund. CBO aims to support the development of SIBs, and other financial mechanisms, amongst public bodies.

This ground-breaking nine year evaluation is focusing on evaluating the development and impact of SIBs both funded by the programme and beyond. The method includes consultations and surveys with commissioners, stakeholders and investors, a range of 'deep dives' and case studies with areas introducing SIBs and collating MI data to understand the impact.

Service area:

- Research and evaluation;
- Consultancy.

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Contact details:

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Eight Ninths Ltd

Eight Ninths Ltd is a small health and social care consultancy company working primarily in the north of England. Our client base is mainly healthcare providers, though we have also worked with NHS commissioners, local authorities, small businesses, and community interest companies.

We help organisations to develop strategy and to identify and progress new business opportunities; we can also support the programme or project management of complex and difficult new projects, especially where there may be tension and conflict. We can undertake business planning and costing and can support organisations to create financial plans. We are interested in innovation and innovative ways of responding to the challenges of the health and social care sector, including the use of social impact bonds.

Service area:

- Management consultancy

Policy area: Health and social care

Previous experience with SIBs:

We were commissioned by a forward-looking social interest company to provide advice on an advanced model of commissioning for outcomes, using a social impact bond. We have also provided advice to NHS healthcare providers and third sector organisations on the opportunities and challenges arising from SIBs.

Location:

North West, Yorkshire and the Humber

Contact details:

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Chris O'Gorman, Director: info@eightninths.co.uk

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Firstcare Consultancy Ltd

Firstcare Consultancy's mission is simple: to improve outcomes for those who are at disadvantage in our society.

We recognise that there are specialist providers and interventions that have the power to make a sustainable difference to people's lives, but that they may not necessarily have the infrastructure or the opportunities to maximise that impact. Or - far too often - the funding to sustain existing successful programmes.

Likewise, commissioners and service teams, elected members and those in positions of responsibility for policy may have a clear strategic vision as to what's needed to improve people's lives, but that demonstrating impact and accessing appropriate sustainable funding can prove challenging.

Firstcare provides our clients with a specialist targeted resource. We can support you wherever you find yourself on the social impact/ social investment bond journey. We are very happy to have free exploratory discussions with you, to help you test out your first thoughts.

Service Area:

- Feasibility studies - identifying opportunities and challenges;
- The need, the intervention and the outcomes payment metrics;
- Stakeholder and investor engagement;
- Business case development;
- Project management.

Policy area: Children's services and all related areas, including early years, older people and health.

Previous experience with SIBs:

As Chief Operating Officer of the leading edge-of-care SIB intermediary - Evidence-Based Social Investments Ltd (EBSI), Isabelle's projects included:

- Three successful CBO Development Grant Applications, two in-principle full awards for edge of care SIB propositions (totalling £2.6 million);
- Delivery of full SIB feasibility studies in four local authorities in policy areas such as edge of care, substance misuse and step-down programmes, specialist input to support co-delivery partners;
- Beyond feasibility: planning and implementation of commissioner/ provider/ investor dialogue and SIB contract negotiation.

Contact details:

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Future Public

Future Public is a service design agency and social impact intermediary, with experience in the design and development of new propositions and solutions and a proven track record of supporting SIBs in implementation and delivery phases. We specialise in areas where we have deep sector expertise and existing relationships:

- health and social care (particularly around ageing / elder care)
 - employment and skills (particularly long-term unemployment)
 - justice and offender rehabilitation
 - children's services (fostering and adoption)
 - complex needs / multiple interventions
1. Proposition Design / Development: We use collaborative design practices, involving service users, practitioners, commissioners and delivery organisations to develop commercially viable, user-led and high social impact solutions. This is essential in developing new models which involve multiple stakeholders so there is an agreed delivery blueprint and deep alignment of philosophy and approach.
 2. Support in Implementation / Delivery: We have supported the implementation of a therapeutic fostering SIB by developing the governance and reporting capability; also embedded new performance management, data analysis and reporting processes into a national adoption SIB.

Service area:

- Business/proposal development and Service design
- Commercial and Capacity building
- Performance management and Impact analysis

Previous experience with SIBs:

Future Public has supported SIBs on behalf of Bridges Ventures, and applications for the Commissioning Better Outcomes Fund and Social Outcomes Fund.

- **Therapeutic Fostering (Action for Children, Manchester):** Future Public assisted with the SIB mobilization, working with the operational delivery team to design and implement their Board governance and reporting processes.
- **Adoption and Fostering:** Future Public has been engaged by the SIB for over six months to help streamline process across six delivery agencies, taking on the Operational Management role, whilst improving impact analysis and reporting for the SIB Board.
- **Oxfordshire CCG:** Future Public supported the CCG and County Council to deliver independent supported living for people with learning disabilities and complex behaviours, currently living in out of county placements. We managed the design of the new service and development of a business case.

Contact details:

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Gecko Programmes Ltd

Gecko works to develop organisations, projects and people, focusing upon the creative and voluntary sectors. We are an Approved ICRF Provider and have worked with a range of private sector organisations and public sector institutions to bring about organisational change, or to develop discrete projects. In practice, we develop and test business and marketing plans and build operations with the appropriate strategy, systems, skills and staff. We also prepare and submit tenders and proposals.

As an EDI centre, we are able to bring external funding for the provision of training programmes. We also operate beyond this nation, with European curriculum development partnerships and partnerships that transfer innovative curriculum across the EU, so that we stay at the leading edge of curriculum delivery.

Service area:

- Enterprise development;
- Building sustainability;
- Business planning;
- Marketing planning;
- Governance;
- Operations;
- People development.

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

Investment and Contract Readiness Fund Approved Provider Mutuals Support Service

Location:

London, South East, South West

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Hogan Lovells International LLP

Hogan Lovells is a global legal practice that helps corporations, financial institutions and governmental entities across the spectrum of their critical business and legal issues, globally and locally. We have over 2,500 lawyers operating out of more than 40 offices around the world.

Our practice breadth and industry knowledge provide us with insights into the issues that affect our clients most deeply, enabling us to provide high quality business-oriented legal advice to assist them in achieving their goals, whether commercial or social.

Service area:

- Legal

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

Advice in relation to a social investment bond for a charity. Advice in relation to the creation of investment products to provide funding to social sector organisations tackling unemployment. Advising Pants to Poverty, a Fairtrade organic underwear brand, in issuing a unique financial instrument under which part of the interest was payable in kind.

Contact details:

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Andrew Carey: andrew.carey@hoganlovells.com

or Tel: 020 7296 2000

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I for Change

I for change is an FCA-registered financial intermediary - a social investment consultancy. We have worked on a range of social investments, including social impact bonds, funds, and direct investments.

Public Sector: Social investment in public services often involves payment-by-results contracts and public sector spin-outs. We understand the complex dynamics surrounding the detail of social investments and have worked on several social impact bonds and alternative structures.

VCSEs: We work with voluntary sector organisations and social enterprises to prepare for social investment - we train executives and trustees in social investment and work on specific deals from initial concept, to identifying appropriate outcome metrics, to raising investment money.

Social investors: We offer financial advice and due diligence services. We help investors find deals that meet their economic and impact goals, and fit social investments into a wider investment portfolio.

Service area:

- Metric design;
- Financial modeling;
- Structuring a SIB;
- Working efficiently with lawyers.

Previous experience with SIBs:

Introduced and advised investors in a SIB. Part of a Big Lottery Funded team gathering evidence to support metrics for a complex SIB. Helped a delivery company negotiate terms with a local authority for a SIB. Our managing director has also worked on SIB tenders, and sits on the board of a SIB delivery company.

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ICF International

ICF International is a leading provider of public policy consulting services in the UK. Our expertise comes from some of the first and most comprehensive evaluations of PbR and SIB interventions in the UK - including the London Homelessness SIB. Our multi-disciplinary team has a deep understanding of effective PbR and SIB design, implementation and evaluation.

We have international - notably from the United States - expertise and resources including evidence clearing houses. Our librarians search 60,000 English language sources each week. Our expertise in the identification, collection and analysis of the best evidence is complemented by our sensitive and tailored approach to working with commissioners, providers and their stakeholders.

Service area:

- Evidence reviews, Intervention models and Outcome definition;
- Costs and Cost savings;
- Social return;
- Process evaluation and Impact evaluation;
- Stakeholder engagement;
- Feasibility studies;
- Performance management tools and PbR design.

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

We are currently (2013-2016) evaluating the London Homelessness SIB for DCLG. One of the first SIBs in operation, it is managed by GLA and targets entrenched rough sleeping in London. In addition, we have:

- Provided consultancy support to organisations considering PbR and SIB models;
- Worked with the cross-government analysts PbR group to facilitate shared learning;
- Undertaken evaluations of PbR schemes;
- Undertaken reviews of social investment for BLF/Big Society Capital/HM Government/City of London and community finance for CDFI;
- This work, since 2011, provides the foundation for our SIB services, including US colleagues' work supporting 'payment for success' schemes.

Location:

National

Contact details:

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Kai-zen Global Business Services

Kai-zen is a management consultancy company that supports organisations in the UK and worldwide to do more good - to achieve maximum social and environmental impact. Kai-zen is an internationally recognised business improvement philosophy that literally means 'to change and improve for the better'. We use continuous improvement methods to enable organisations to achieve change that lasts and we strive for quality, efficiency and innovation.

We support public sector organisations to develop new funding and delivery models that achieve efficiency savings and maximise social impact. We also help VCS organisations to do more good and achieve sustainability. Finally, we help social investors, funders and financiers by identifying and supporting quality organisations that have the potential to achieve the biggest social and environmental impact.

Service area:

- Public Sector business cases, Operational models and Social impact models
- Evaluation: Social and financial return on investment
- Market development and VCS supply chain development
- Social investment
- Public sector reform, strategic commissioning, co-production
- Brokerage and due diligence

Policy area: Criminal justice, Health and social care, Children and young people, Older people, Drugs and alcohol

Previous experience with SIBs:

- Secured development funding to design and develop Social Impact Bonds for public sector and voluntary and community sector organisations
- Delivered technical support as follows: Stakeholder engagement, co-production, change management, outcomes metric and specifications, financial modelling and payment mechanisms, operational models, social investor engagement
- Supported public sector agencies to co-produce outcomes with citizens, and develop joint commissioning and procurement models
- Set up special purpose vehicles, developed co-produced outcomes plans and delivery models and developed local, quality assured supply chains
- Developed public sector Business Cases

Location:

West Midlands, East Midlands

Contact details:

Natasha Jolob: Natasha@kai-zenglobal.com

Tel: 01455 271161

Mob: 07590 523 540

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Muckle Solicitors

Muckle LLP is a law firm for businesses based in Newcastle upon Tyne. We are regionally and nationally recognised as having a leading Charities Team.

Independent legal directory, Legal 500, states Muckle LLP is ‘excellent across the board’, forming ‘an integral part of its clients’ businesses.’ They have ranked the firm in the top Tier for ‘Charities and not-for-profit’ organisations. The other leading legal directory, Chambers and Partners ranks Muckle nationally for ‘charities’, commenting that the firm has ‘substantial experience acting for social enterprises and grant-making organisations. The breadth of our clients’ activities includes the full range of charitable purposes, including education and research; sports and recreation; arts and culture; social housing; health and social care; and religion and the environment.

The team has a wealth of experience including advice on:

- legal structures;
- fundraising and events;
- trading and sponsorship;
- governance and constitutional reviews;
- grants and contracts;
- restructuring including incorporations;
- mergers and winding up;
- social finance.

Contact details:

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or Tel: Direct line: 0191 211 7958

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Mutual Ventures

Mutual Ventures is a **socially-focussed consultancy**, operating nationally, and committed to support public service commissioners, VCSEs leaders and front-line staff who are seeking to identify, develop and grow the right delivery model for their services. We are a friendly team of 15 permanent consultants who bring expertise from a variety of backgrounds in the voluntary sector, local government, and the commercial sector.

We are **delivery partners of a number of national programmes** for the **Department for Education** (Innovation Programme, Regional Adoption Agency Programme), **Big Lottery Fund** (Headstart) and **Cabinet Office** (Going for Growth Training, Mutuals Support Programme - now closed). We have been **approved providers on a number of national funds** such as **Big Potential Breakthrough & Advanced** (100% success rate on BP Advanced), **Impact for Growth**, **Investment and Contract Readiness Fund**, **Impact Readiness Fund**.

Policy area: Covering Children's services, Youth services, Early years, Public health, Adult social care, Education, Learning and employability services, Criminal justice, Leisure and culture services.

Service area:

- Strategy planning & options appraisals
- Feasibility studies & Business case development
- Investment readiness and investor relations.
- Social value: theory of change, measurement frameworks
- Service design / definition
- Financial modelling
- Stakeholders' engagement strategies
- Partnership building
- Governance set-up and review

Previous SIB experience:

We have supported some of our clients to consider SIBs (such as Cambridgeshire MST) and coached them through the process of developing an approach. As part of the DfE Innovation Programme, we are currently coaching over 10 innovation projects who are looking to bid for SIBs. We have extensive experience in supporting clients to become investment ready. As such, we have successfully supported charities and social enterprises to raise social investment (up till 500K), allowing them to launch innovative services and grow substantially.

Contact details:

www.mutualventures.co.uk

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Andrew Laird: andrew@mutualventures.co.uk Tel: 07779 754 553

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Numbers For Good

Our mission is to bridge the worlds of finance and social and environmental impact. We are a social investment organisation committed to making a significant contribution to the social sector through supporting charities and social enterprises, investors and commissioning organisations. We create financial solutions that allow organisations to fund social and environmental projects as well as connect investors with opportunities for sustainable financial and social returns. Since our inception we have designed and launched two social impact bonds, created an accelerator fund for social entrepreneurs seeking to tackle healthcare inequalities and helped numerous social enterprises, charities, housing associations and corporates understand how social investment can help them.

Service area: Numbers for Good develop social impact bonds from feasibility stage through to execution. Our services include:

- Developing social outcomes for a particular social intervention model;
- Estimating and validating commissioners' cashable savings from a specific intervention;
- Financial modelling SIB cash flows in the run-up to commissioning;
- Engaging and negotiating heads of terms;
- Securing the contract and raising the capital investment required to allow the SIB projects to become fully operational;
- Performance management of SIBs once they are in operation.

Policy area: Drug and alcohol dependency, children's services, early years, young people, older people's services, healthy lives, criminal justice, education, employment, families, health and social care, local services, sport and leisure.

Previous experience with SIBs:

We are one of only a handful of organisations to successfully structure, raise investment for and bring to market social impact bonds, working with Fusion Housing and Home Group via the Fair Chance Fund - the Department for Communities and Local Government and Cabinet Office Fund for organisations tackling youth homelessness. We completed nine SIB feasibility studies via Commissioning Better Outcomes (CBO), and are currently finalising a number of social impact bonds. Via CBO we worked with commissioners across the South West, South East, North West, London and the North East including local authorities, CCGs, NHS England and housing associations. We also supported several charities and social enterprises to drive forward SIBs.

Location: National

Contact details:

www.numbersforgood.com/

Matt Black: matt@numbersforgood.com Tel: 0207 148 6741

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OPM Group

OPM Group is an independent employee-owned research and consultancy organisation which supports and champions the delivery of social impact. We work with public, private and third sector organisations and deliver: research and insight, evaluation and impact analysis, public engagement, and organisational development and change management services. Dialogue by Design is our specialist consultation planning and analysis service, established in 1989. Ownership, social value and improving social outcomes runs through all of the work we do.

Service area:

- Feasibility study support to explore potential for outcomes-based commissioning and/or social investment;
- Understanding and modelling activities and outcomes;
- Identifying target cohorts and/or supporting co-produced interventions;
- Financial modelling and support for developing business cases;
- Commissioning support, including co-commissioning arrangements;
- Engaging with and/or building capacity within service provider organisations;
- Workforce and service user engagement and engaging with social investors;
- Evaluation.

Previous experience with SIBs:

- Conducted a three-year evaluation of the first local authority-led SIB: the Essex County Council Multi-Systemic Therapy SIB. This evaluation focused on the impact of the SIB itself, added value, 'invisible costs' and how they may be 'designed out', and also included an international practice share group;
- Conducted an evaluation of Peninsula Local Integrated Services Trust (LIST), a special purpose vehicle set up by Devon, Cornwall, Torbay and Plymouth. This evaluation looked specifically at SPV model value to co-commissioning;
- Providing commissioner advisory support to North, Eastern & Western (NEW) Devon Clinical Commissioning Group (CCG) to explore the feasibility of an outcomes-based commissioning approach for tackling alcohol dependency, and developing a full business, including investor and provider engagement;
- Providing analytical support to Ways to Wellness as part of the Newcastle SIB to enhance understanding of 'what works, why, and for whom', to improve data management systems, and to distil learning for improvement;
- Supporting the development of SIBs in Japan since 2014. We are currently providing expert advice for the SIB feasibility study in Yokohama City.

Location: National

Policy Areas: Any

Contact details:

Dr Chih Hoong Sin, Director: csin@opm.co.uk

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PricewaterhouseCoopers LLP UK (PwC)

PwC is one of the world's pre-eminent professional services organisations. As professional advisers we help our clients solve complex business problems and aim to enhance their ability to build value, manage risk and improve performance. We have a dedicated Social Investment and Enterprise Team that provides a range of services to social enterprises, charities, commissioners in the public sector, impact investors and corporates.

Service area:

- Multi-disciplinary including audit, tax, impact and financial advisory services;
- Specific services include investment readiness, business planning, contracting, particularly in relation to payment by results and Social Impact Bonds, fund development, social impact measurement, project management and tax advice.

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

PwC has been working with a range of public sector and social organisations to develop business and investment cases for alternative commissioning approaches based on the principles of PbR and SIBs. This work has included developing the technical guide to commissioning SIBs (with Social Finance Ltd); Advice to a group of councils in the South West of England on their SIB project; Assisting a unitary authority and other partners to improve outcomes and reduce the levels of domestic abuse in their locality (by developing a financial model to estimate the extent to which the costs to each of the public sector partners varied with levels of domestic abuse and how such costs respond to alternative early intervention strategies and payment by results commissioning approaches including SIBs).

We are also working with one of the leading Social Enterprises in the UK to test, refine and validate their Social Value Framework (SVF) with public sector commissioners in order promote consistency in the procurement and monitoring of - amongst other approaches - SIBs and PbR. Finally we also regularly engage with social investors and have helped set up two new UK Funds to respond to and support a range of payment by results programmes.

Location:

National

Contact details:

Nichola Swann: Nichola.Swann@uk.pwc.com Tel: 0789 406 5226

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Pro Bono Economics

Pro Bono Economics helps social ventures understand and improve the impact and value of their work, which is a critical step towards being investment ready. We provide a high-quality advice and consultancy service at affordable cost by harnessing the power of expert volunteers to provide front line advice.

We understand valuing outcomes, attribution and cost/benefit and have the practical skills to identify, assemble and interrogate relevant data. This experience helps develop successful bids to the fund, informs effective commissioning and assess the effectiveness of programmes. We staff projects by matching expert economics volunteers with ventures and our current database contains over 500 qualified experts. We are the only organisation in the UK that delivers economic advice in this way.

We start by understanding the organisation's mission, their clients, what they deliver (programme design) and the results they generate (outcomes). This informs a tight project brief. Through our links to prominent economics and statistics organisations, we have wide ranging access to comparative data sets and other evidence to provide useful benchmarks. These assist in finding relevant measures or proxies for value and help validate outcomes (defining and developing relevant counterfactuals).

Service Area

Our projects typically fall within three categories:

- Data collection advice;
- Economic impact analysis / evaluation;
- National analysis using national datasets (e.g. the scale of a problem such as low adult numeracy).

Previous experience with SIBs:

PBE's cost benefit analysis for St Giles Trust helped them participate in the Peterborough project, the first Social Impact Bond in the UK. We also provide advice on impact management to Big Society Capital SIFs and investees and are an approved provider for the Access Impact Management programme. Senior staff within the team have extensive experience of working with successful SIBs in the DWP Innovation Fund.

Policy Area: Our projects focus on wellbeing, supported by strands of work in Education; Employment; Mental health and Resilience; Complex needs (people at the edge of communities who are vulnerable to homelessness, addiction and debt).

Contact Details

www.probonoeconomics.com

Gemma Bruton, Director of Services:

Tel: 020 3632 2668

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RedQuadrant

RedQuadrant is an exciting transformation consultancy for the public sector. As recognised experts in local government, we have a successful track record of supporting clients to actively grasp the potential of change. Our approach to transformation is to focus on making change happen whilst ensuring that change is sustainable and hence skills transfer and co-design are central to our work.

We have undertaken work with over 50 local authorities, the police, probation trusts and the charity sector. We have worked with these organisations to develop and implement improvements and models that save money whilst retaining and improving service levels.

Service area:

Our service areas include:

- Change and transformation;
- Management support;
- Interim support;
- Training and coaching;
- Strategic reviews;
- Improved delivery models and service design.

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

Through our national network of experienced consultants, our expertise in Social Impact Bonds (SIB) includes:

- A feasibility study on a SIB scheme for reducing offending levels in two local authorities in South East England;
- Assessing a business case for a for a social enterprise SIB scheme to reduce overcrowding and youth unemployment in London;
- Providing contract readiness services to organisations in the public and voluntary sectors, monitoring services and providing analysis to social investors;
- Providing commercial advice to probation staff-led mutuals in securing social investment and in negotiating with prime providers bidding for work under the Transforming Rehabilitation programme.

Location:

National

Contact details:

John Wheeldon: john.wheeldon@redquadrant.com Tel: 07887442487

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SafeLives (formerly CAADA)

SafeLives is a national charity dedicated to ending domestic abuse. Previously called CAADA, we chose our new name because we're here for one simple reason: to make sure all families are safe. Our experts find out what works to stop domestic abuse. Then we do everything we can to make sure families everywhere benefit. It works: after getting the right help, more than 60% of victims tell us that the abuse stops. Our new strategy focuses on addressing the needs of the whole family - including perpetrators.

Service area:

Domestic Abuse advice and consultancy including:

- Advice to commissioners;
- Training;
- Accreditation;
- Data collection and analysis.

Policy area: Criminal justice, Families, Health and social care, Local services, Young people

Previous experience with SIBs:

We do not have direct experience of developing a SIB but we do have extensive experience of working with commissioners (PCCs, Local Authorities and most recently CCGs) to map their expenditure across domestic abuse services, measure outputs and outcomes. We have developed an outcome framework for domestic abuse commissioners and an accompanying set of KPIs for community based services.

Location:

National

Contact details:

Sonal Shenai, Head of Consultancy: sonal.shenai@safelives.org.uk Tel: 07554 450373

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The Young Foundation

The Young Foundation was established in 2005 and has been instrumental in driving thinking, action and change in social innovation in the UK and abroad. Our priority is tackling inequality through disruptive innovation.

We work closely with individuals, communities and partners building relationships to ensure that our thinking does something, our actions matter and the changes we make together will continue to grow. We operate nationally and internationally and currently employ 49 staff. We organise our work around three core business areas; Research, Applied Innovation and Ventures.

Service area:

- Business analytics

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

The introduction of SIBs and Payment by Results (PbR) in public sector commissioning has made the need for effective management data processes even more urgent. We have years of experience in collecting and analyzing data to monitor and improve delivery.

We have supported a local authority identify the right data to monitor delivery of services in their children's centres, worked with probation trusts to support the commissioning of drug and alcohol rehabilitation services, and developed cost benefit models for the social housing sector and for allied health professions seeking evidence to convince commissioners of the value of their services.

Location:

East of England, London, South East, South West

Contact details:

www.therighttoknow.co.uk

Dr Tony Munton: tony.munton@thertk.com Tel: 020 7060 2475 / Mob: 07720 297995

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Tim Davies-Pugh

Service area:

- Business planning;
- Social Impact;
- Financial Modelling and Funding.

Policy area: Homelessness, Education, Families, Health and social care, Young people, Drug and alcohol recovery

Previous experience with SIBs:

Tim has a breadth of knowledge working across funding (grant and social investment), investment readiness/development and capacity building as well as holding a strong understanding of a range of social policy areas. Previous experience includes working on social investment at a national level as the lead for the development of the Big Lottery Funds social investment strategy, which included the development of Big Potential, CBO and the creation of the Power to Change Trust and Access Foundation. He has worked with a range of organisations and public bodies nationally with a concentration in the North East, North West and London.

Location:

North East, National

Contact details:

Tim Davies-Pugh:

tim@timdavies-pugh.com

Tel: 07748 180773

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Triodos Bank

Triodos is one of Europe's leading ethical banks, financing and supporting organisations whose primary objective is to generate a positive social or environmental impact. The Bank has operations in five European countries including the UK with over £8.5bn of funds entrusted to it. The UK based Triodos Corporate Finance team are widely recognised as a leading intermediary in the social investment sector, with considerable experience in advising charities and social enterprises on raising the finance required to deliver payment-by-results (PBR) contracts. We also have a commissioner advisory team which supports commissioners to procure services on a PBR basis or via a social impact bond. We are an approved provider for the Big Potential Fund.

Service area:

For providers (charities, social enterprises, housing associations) -

- Supporting providers in bidding for competitively tendered payment by results contracts, including bid writing;
- Assisting providers in identifying the level of social investment required to finance their delivery model;
- Assisting providers in structuring their social impact bonds and advising on the likely terms of any social investment;
- Financial modelling and preparation of investor due diligence packs;
- Investor engagement, negotiating optimal terms with those investors and managing responses to investor due diligence;
- Advising on, and negotiating, investment agreements and the terms of contractual agreements between key stakeholders.

For commissioners -

- Assisting commissioners in assessing feasibility, designing, structuring and procuring social impact bonds that work for key stakeholders (commissioners, providers and social investors).

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

Since 2011, Triodos Corporate Finance have successfully advised on 7 SIBs, raising over £5 million of investment to fund £20 million of payment-by-results contracts across a range of programmes including the GLA Rough Sleepers SIB, the Innovation Fund, the Fair Chance Fund and the Youth Engagement Fund. We are also working closely with several local authorities on the design and implementation of SIBs across a number of policy areas.

Location: National

Contact details:

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Roger Bullen, Commissioner Advisory Services: roger.bullen@triodos.co.uk
Tel: 07393 765981

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The following organisations also appear in the Fund's Directory of SIB Investors:

Northstar Ventures Ltd

Northstar Ventures is one of the North East of England's leading and ambitious intermediary investors, managing a number of funds aimed at innovative, high growth businesses and social enterprises across the region. The North East Social Investment Fund is a £9m fund investing in sustainable Social Enterprises, to improve their social impact in key priority sectors. Our investment team has considerable experience in working with social enterprises to raise finance in the social investment sector and has worked with providers and deliverers to structure a social impact bond.

Service area:

- Funding
- Deal structuring
- Analysis

Policy area: Any

Previous experience with SIBs:

We have successfully structured a SIB funded by the DCLG Fair Chance Fund and being delivered by Home Group and others in Newcastle and the North East. The project is aimed at reducing homelessness and improving well-being through education and employment of disadvantaged young people with complex needs.

Location:

North East

Contact details:

Peter Gilson, Investment Manager: peter@northstarventures.co.uk

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Social Finance

Social Finance is the global leader on Impact Bonds: we pioneered the first investment in Peterborough and have led the development of over 25% of all Impact Bonds worldwide. We partner with government, the social sector and the financial community to find better solutions to society's most difficult problems. Our team of 60+ professionals has a reputation for creating holistic, sustainable, systems-changing approaches.

We have worked with over 50 charities, 20 foundations, 6 central government departments, 30 Local Authorities and countless service users. We are the leading developer of social investment partnership structures in the UK, including Social Impact Bonds (SIBs) and other forms of project finance.

Service area:

Social Finance offers the following services:

- Corporate Finance;
- Commissioner Advisory;
- Social Impact Bonds - design and delivery;
- Development Impact Bonds - design and delivery;
- Investment Readiness and Enterprise Advisory;
- Performance Management;
- Impact Funds.

Policy area: Criminal justice, Education, Families, Health and social care, Local services, Sport and leisure, Young people

Previous experience with SIBs:

We led the end-to-end design, development, capital raise, and performance management of the world's first SIB. We have since been involved in the development of 13 other programmes in the UK and more than 15 in the US, Israel, Canada, Portugal and India. We have designed or launched SIBs in areas including rough sleeping, health and disability related unemployment, children on the edge of and in care, young adolescents at risk of becoming NEET, loneliness and social isolation, and improving end of life care. We have mobilised over £100 million of social investment, including over £14m raised specifically for SIBs in the UK.

Location:

National

Contact details

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End of Directory