



2017 'State of Shared Value' Survey

Research Partner: Invitation for expression of interest

In order to engage a Research Partner for the second 'State of Shared Value' survey, the Shared Value Project has issued an open Expression of Interest (EOI) with no restrictions as to those organisations that may respond. The Shared Value Project invites organisations to submit their EOI for the opportunity to collaborate on this piece of research and be part of the development and ongoing progress of shared value activity in the region.

1. Project Overview

- Building on the success of the inaugural 'State of Shared Value in Australia' survey in 2015, the survey will be conducted again in 2017 for a second time in Australia and for the first time in New Zealand (NZ) with results to be released at the Shared Value Forum in April 2018.
- SVP is looking to broaden and refresh the initial benchmark created in 2015 and present a new set of data specific to Australasia to track the ongoing progress around shared value activity in the region.
- The survey will target ASX 100 and NZX 50 companies to investigate their engagement with shared value and provide tangible feedback and research into the current state of shared value in Australasia.
- The survey will be lead by the Shared Value Project (SVP) and supported by a series of partners to conduct the survey and analyse results, produce the survey report, and promote and distribute the report and results.
- A media and communications campaign and a series of events will be held around the release of the report to help raise the profile of shared value activity in Australasia, as well as the Shared Value Project and its members.

Purpose

- To inform SVP members, the Australian and NZ business communities, and broader public of shared value activity in Australasia.
- To measure and track the ongoing progress around shared value activity in the region, and the impact of SVP on Australasian business.
- Provide an opportunity to profile leading local examples of shared value, building the collection of 'proof points' for businesses across the region.
- Increase the general knowledge and awareness of shared value theory and opportunities in Australia and the Asia Pacific region.
- Provide an opportunity to raise the profile of SVP and survey partners.
- Inform SVP and the shared value community as to how we continue to support and build the movement.

Objectives

- Undertake a survey to produce a set statistics and insights to measure the current status of shared value activity in Australia and NZ, and reflect against the baseline created in 2015.
- Increase participation levels for the survey from 2015. Target 200 companies, aiming for at least 75 responses. (2015: 163 companies contacted, 41 responded)
- Produce a report outlining the results and insights from the survey, including various case studies from the region.
- Hold at least one event in both Australia and NZ to launch the report and results.
- Develop and deliver on a media and communications plan to obtain media coverage around the results of the survey, and raise awareness around the shared value concept, SVP, and survey partners.

Survey Process

1. Development

- Questions to be developed by the Research Partner in consultation with SVP.

2. Survey Distribution

- Survey set up and conducted using Survey Monkey or similar platform
- Develop target list of companies, key contacts, and contact details.
- Send out invitation and link to participate via email.

Target Audience

- CEOs, heads of strategy, corporate affairs, corporate responsibility/shared value – one person to complete the survey on behalf of an organisation as a whole.
- ASX100 and NZX50 companies and other appropriate large scale private companies
- Target 200 companies, aiming for at least 75 responses. (2015: 163 companies contacted, 41 responded)

3. Results and analysis

- The results will be analysed by the Research Partner to draw out key insights and messages, and to produce the written content for the survey report.
- Draw out stand out case studies to feature in the report, where needed obtain additional supporting information on the organisation/project and approval on information to be published if required.

4. Report

- Physical printed version and digital version of the report to be designed based on written report content.
- Where possible and appropriate, design elements to reflect SVP branding and aesthetics of 2015 report to maintain consistency.
- The report will be co-branded, including the logo of all partners involved.

5. Launch

- Official report launch as part of a session at the 2018 Shared Value in April (date TBC).
- Separate briefing sessions to launch report and results (e.g NZ)
- Media and communications campaign

Timeline

- October 2017 – Research Partner invitation for EOI and Research Partner selected
- November 2017 – February 2018 – Survey development, distribution, results and analysis, report content, case study development
- March 2018 – Report design and finalised to print, prepare media and communications activity and content
- April 2018 – Report launch at the 2018 Shared Value Forum. Session at the forum along with communications campaign to follow
- May 2018 – Briefing sessions on results

2. Research Partnership

Deliverables

- Provide pro-bono services
- Develop survey questions and questionnaire setup
- Develop the distribution/target list
- Distribute survey to the target list of participants
- Analysis of survey results
- Write report content
- Develop key findings and highlights
- Work with SVP on promotion around the report and results

Benefits of being involved

- Collaborate with leading companies
- Contribute to the direction of the research
- Be at the forefront of new insights into shared value to inform your own business activity
- Receive broad coverage of your brand to a wide audience of cross-sector organisations, and a platform to be positioned as a leader in the development of shared value

3. Expression of Interest Process

In order to engage a Research Partner for the second 'State of Shared Value' survey, SVP has issued an open EOI with no restrictions as to those organisations that may respond.

SVP will evaluate the EOI applications received to select the successful Research Partner.

Selection Process

- Tuesday 3 October 2017 - Invite EOI
- Tuesday 17 October 2017 - EOI Applications close
- Late October 2017 - Assess applications & further consultation/interviews
- Tuesday 31 October 2017 - Award Research Partnership

EOI Applications

1. Applicants must submit responses to each of the following key criteria:

Organisation capacity, experience and achievements

- Experience and performance on projects of a similar size, nature and complexity in Australia over the last five years; with proven capacity, ability and experience in working and delivering projects in the corporate sector
- Outline the composition of the applicant's research delivery team, including the key personnel and major sub-contractors proposed in the case of the applicant becoming the partner for the proposed work

Task Appreciation and Methodology

- Understanding of shared value and appreciation of SVP's requirements in the delivery of the project;
- The approach proposed for the survey research;

2. A capability statement is to accompany the EOI applications (optional)

Submission of EOIs

Applications must be submitted electronically via email.

Submissions should be in one document no longer than two pages and submitted in PDF format. The optional capability statement should be no longer than one page.

Submit your EOI to:

blloyd@sharedvalue.org.au

by 5pm (AEDT) on Tuesday 17 October 2017

Contact Person

All enquiries in respect of this EOI are to be directed to:

Name: Briar Lloyd, Member Liaison, Shared Value Project

Ph: +61 3 9013 7500

Email: blloyd@sharedvalue.org.au

Following the close of submissions for the EOI, applicants will be informed of appropriate contact persons for subsequent communication.

Please note the following:

- SVP reserves the absolute discretion to accept or reject an application or all applications. No guarantee is given that an application or any applications will be accepted.
- The project information and project program is subject to change. EOIs must be based on the briefing documents provided by SVP at the time EOIs are invited.
- Unless specifically stated in this Request for EOI, SVP will not be liable for any costs or damages incurred by applicants through participation in the EOI process.

4. Further reading

- **2015 State of Shared Value in Australia Survey**
<http://sharedvalue.org.au/campaigns/2015-state-of-shared-value-in-australia-survey/>
- **2015 State of Shared Value in Australia Survey questionnaire**
<http://sharedvalue.org.au/wp-content/uploads/2017/10/2015-Shared-Value-Survey-final-1.pdf>
- **Announcement: Shared Value Project releases 2015 'State of Shared Value in Australia' survey report**
<http://sharedvalue.org.au/shared-value-project-releases-2015-state-of-shared-value-in-australia-survey-report/>
- **#SVSurvey15 launch kick-starts conversation on the state of shared value in Australia**
<http://sharedvalue.org.au/svsurvey15-launch-kick-starts-conversation-on-the-state-of-shared-value-in-australia/>