Social Value 101

Tuesday 13 June
14:00 GMT
Panel

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STAR Procurement

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London Borough of Waltham Forest

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Faithful+Gould

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Senior Consultant
7 Step Solutions

Sol Tannir
Strategic Account Manager
Social Value Portal

#SVC23
Social Value Case Studies
London Borough of Waltham Forest

Joanna Dahlgren
Head of Social Value & SROI, London Borough of Waltham Forest
THINK IMPACT – THE ROLL OUT OF SOCIAL VALUE IN WALTHAM FOREST

2020
Awareness, Understanding, Purpose

2021
Approach, Strategy, Development

2022
Partnerships, Collaboration, Innovation

2023
Impact Monitoring, Improvement

PRIORITIES

PARTNERSHIPS

MEASURE THE IMPACT

Partnership with SV Portal & National TOMs
10% SV Weighting
Public Service Strategy
Dedicated SV function – ROI

WF SV Framework & Golden TOMs
Social Value Policy 2021-2025
Investment in Social Value Team

Environmental Measures
TROI
Single Reporting Framework
SVMI

Social Impact Report 2020-2022
Social Value Annual Statement
Social Value Toolkit
SV in Planning
Enabling Community Benefits Through Added Value

DESIGN – PRE PROJECT PHASE
Project concept – Design & Engineering Notification & Consultation

COMMISSIONING (Defined Approach)
Protocol development and Commissioning SCB & Tiered Approach – tender £

PROCUREMENT
Implementation & Governance Approach Tendering & Quotation Evaluations – Contract award Enhanced support throughout procurement cycle

CONTRACT MANAGEMENT – EXECUTION
Project Execution Reporting & Performance Management Support for Contract Directors & Suppliers
TOTAL RETURN ON INVESTMENT - SINGLE REPORTING FRAMEWORK

**Priorities**

2019 - 2020

- SOCIAL VALUE DELIVERED
  - £42k

SV Embedded in Procurement – Construction

2020 - 2021

- SOCIAL VALUE DELIVERED
  - £7.7m

SV Embedded in Procurement & Commissioning

2021 - 2022

- SOCIAL VALUE DELIVERED
  - £29m

Impact Monitoring across Capital Delivery, S106 & SV

**Collaboration**

**Innovation**

Capital Portfolio- Level Impact Monitoring

- Planning / project-level data
- Social Value Portal data
- S106 obligations

SV Embedded in Procurement – Construction

2019 - 2020

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2020 - 2021

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Impact Monitoring across Capital Delivery, S106 & SV

2021 - 2022

- SOCIAL VALUE DELIVERED
  - £29m
**SOCIAL VALUE - DELIVERED OUTCOMES**

**LOCAL EMPLOYMENT**
- 621 SUSTAINABLE JOBS
- 5,709 WKS
- 548 WKS

**SAFE AND HEALTHY LIVES**
- £27,812,226

**CONFIDENCE IN OUR FUTURE**
- £685,273

**OUR 15 MINUTE NEIGHBOURHOOD**
- £7,166,059

**CAR MILES SAVED**
- 6,811 MILES

**WASTE REDUCTION**
- 7,233 TONNES

**CARBON REDUCTION**
- 379 TCO2E

**VOLUNTEER HOURS**
- 6,382 HOURS

**VCSE SPEND**
- £497,513

**COMMUNITY SUPPORT**
- £769,730

**LOCAL SPEND**
- £11,485,558

**EXPERT HOURS**
- 6,190 HRS

**MSME SUPPORT**
- £16,800
Project Case Studies
Social Value – Construction Phase – Transformation of EMD Cinema into the Soho Walthamstow Theatre

**CONTRACT VALUE**: £18m

**Social & Local Economic Value**
- Committed: £2.16m
- Delivered: £6.54m

**Biodiversity Carbon Offset**
- 96% demolition waste diverted from landfill.

**Environmental Benefits**
- 96%

**PROGRESS AGAINST TARGETS**
- 303%

**EMPLOYMENT CASE STUDIES**

**Fabio Freire**: Fabio was unemployed for over 12 months before enrolling to participate in the Building Lives Academy. He truly has enjoyed the experience and has spoke very highly about the programme. He has found employment with property services company in south west London.

**Gerardina Sarcone**: Gerardia was unemployed for six months before enrolling onto the BLA programme. She credits the coaching & mentoring parts of the programme and the networking with constructions professionals – and say that is what helped her to overcome multiple barriers. She has registered with Construction agency and found work locally in WF.

**Joshua Opoku**: says that the course help him to plan, stay focused, create professional CV. He highly credits the interview techniques and the mock interviews that were part of the programme. The BLA programme connects the participants not only with WDI but also their supply chain and partners. The real value for Josh in this programme was not just finding the employment but opportunity and an structure to progress forward. Joshua had been unemployed for over 12 months before the Building Live Academy. After completing the course and achieving his certificates and CSCS card he obtain work with a local provider.

**Innovative Measures – Community Support Events**
- Committed: £1,000
- Delivered: £13,150

**Virtual Work Experience for young people**
- Committed: 12,000 Hrs
- Delivered: 2,000 Hrs

**Jobs Opportunities**
- Committed: 14
- Delivered: 71

**Work Placements & Training**
- Committed: 25
- Delivered: 18

**PROMOTING LOCAL EMPLOYMENT**

**Soho Theatre Walthamstow to ‘soft launch’ in November**

Both the expected benefit and cost of opening the theatre have increased by millions since plans were first made.

By Victoria Moore
Social Impact generated in addition to SV committed at tender stage

KEY ACHIEVEMENTS
SV COMMITMENT: £2.1M
ADDITIONAL SV GENERATED: 151.2% PROGRESS

SV DELIVERED: £6.4M
18.1% OF CONTRACT VALUE (MEASURED ON INITIAL CONTRACT COST £18M)

27th June - 1st July

Langthorne Park
- Cleaning of disused kitchen and disposal of appliances
- New kitchen + all APP installed
- Clearing the area around the amphitheatre
- Creating of planters for fruit and vegetable growing

Outset Centre
- Created a covered area with seating
- Added a mural to the brick wall
- Created a sports area
- Redecoration of the gaming room
- New tables and chairs provided for the health facilities.

Lime Academy
- Wheelchair access is required throughout
- High- and low-level planters
- Area for chickens and ducks
- Area for further livestock
- Sensory garden
- Benches/seating areas

Building Lives Academy Legacy

27th June - 1st July

1st - 12th August
Tate+Co will be creating positive, lasting social impact that embeds within the ethos of each of the organisations and as a single consortium. The Low Hall Lido Project presents an opportunity to collaborate with LBWF and the diverse Waltham Forest local community to create a tailored and well-considered approach to social value that surpasses the project brief.

Social Value Advisory Service
Providing pro-bono social value advice to develop a social value strategy for the entire project. Our advisory method will utilise the Social Value Approach framework based on prior experiences with clients, such as the British Library and Kings College London.

Sustainable Design workshop led by Tate+Co
Hosting 'Sustainable Design' workshop for young people over 18 years old, also in collaboration with the LBWF Young Advisors or ThinkFOUNDATION.

Creative Design workshop by Walala Studios
Recognising the crucial role creative education and expression plays in empowering communities and improving the health and wellbeing of citizens by providing a positive outlet.

Two-weeks Work Experience at Etude
Offering two-weeks of paid worked experience for an adult through the Waltham Forest council traineeship, jobseeker, or work placement programme.

Office Tours by Tate+Co and Arup
Promoting social mobility within Waltham Forest’s youth population. Therefore, Tate+Co and Arup will offer office tours to a group of students interested in pursuing built environment related careers.

Social Value Framework strategy for Low Hall Sport Ground
SOCIAL IMPACT GENERATED IN ADDITION TO SV COMMITMENT

Deep cleaned and redecoration of the Jubilee Sports Ground changing rooms, toilet facilities, corridor and shower room. The total value generated (supplier’s quote for the works) is £4,510.

Cleaned of disused kitchen and disposal of appliances. Also, installation of new kitchen appliances at Langthorne Park Toy Library and created planters for fruit and vegetable growing.

Energy Saving Tips drop ins were rolled out across the borough including Priory Court and Aldriche Way to help residents in the current increases of the fuel and energy bills.

Procurement programme aimed to support BAME SME in Waltham Forest to tender for contracts with major construction organisations.

45 visits from schools based in Waltham Forest running curriculum based sessions on biodiversity and the environment at Walthamstow Wetland.

Tree planting initiative at Mansfield Park. An opportunity for council colleagues to work in partnership to ensure that the borough is environmentally sustainable.

Year 6 students from Handsworth Primary School invited to Wood Street site to gain an insight of construction roles, help to give them a understanding of the various of career opportunities available.

Young residents that had be homeless given specific employability and benefits advice and guidance to help them move into sustainable employment.

INNOVATION

Connecting people with jobs

Safe & healthy lives

Confidence in our future

Our 15-minute neighbourhood

Waltham Forest
Delivering real social value

Sarah Lambshead
Strategic Social Value Lead, Faithful+Gould
Social Value 101

Sol Tannir
Strategic Account Manager, Social Value Portal
Social Value is Relevant Across an Organisation

Leadership

- **Investor relations**: Prove positive impact
- **Procurement**: Supplier selection
- **Contract managers**: Measure supplier performance/delivery
- **Sustainability**: Meet and track goals

Sales
- **Attract and engage prospects**

Marketing
- **Build brand, trust and competitive advantage**

Human Resources
- **Attract and retain talent**

Finance
- **Standardised reporting**

Social Value Strategy
Measuring Social Value
The National TOMs Framework

Developed by Social Value Portal in collaboration with 40 public, private and third sector organisations, and endorsed by the Local Government Association.

One social value measurement & reporting standard

- A consistent measurement solution that creates a level playing field for businesses
- Designed to embed social value into procurement or measurement activities
- Allows benchmarking and comparability
- Gives practical ways of creating more social value for communities
- Themes of visionary social value creation

Themes: Jobs, Growth, Social, Environment, Innovation

Outcomes: 20

Measures: 40

Endorsed by Local Government Association

Mapped to Sustainable Development Goals
# Social Value TOM System in action - an example

<table>
<thead>
<tr>
<th>Theme</th>
<th>Example Outcome</th>
<th>Example Measure</th>
<th>Unit</th>
<th>Proxy value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs</td>
<td>Local skills and employment ‘for all’</td>
<td>More opportunities for disadvantaged people</td>
<td># ex-offenders employed</td>
<td>£24,269</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of people FTE</td>
<td></td>
</tr>
<tr>
<td>Growth</td>
<td>Supporting responsible local businesses</td>
<td>Improving staff wellbeing and mental health</td>
<td># employees with access to wellbeing programmes</td>
<td>£130.29</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of people</td>
<td></td>
</tr>
<tr>
<td>Social</td>
<td>Healthier, safer and more resilient communities</td>
<td>More working with the community</td>
<td># hours of local community volunteering</td>
<td>£16.93</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Number of hours</td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td>Cleaner and greener spaces and sustainable procurement</td>
<td>Carbon emissions are reduced</td>
<td>tCO2e tonnes reduced</td>
<td>£244.63</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Tonnes of CO2e</td>
<td></td>
</tr>
<tr>
<td>Innovation</td>
<td>Promoting new ideas and social innovation</td>
<td>Safeguarding the natural environment</td>
<td>Innovative measure to respond to the climate emergency</td>
<td>£</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>£ invested £ value of time invested</td>
<td></td>
</tr>
</tbody>
</table>

SV£ = Number of units x Proxy value

Powered by robust data sources

SocialValuePortal.com
Examples of Social Value ...

### Sustainable procurement
Per kilo plastic reduction: **£158**

### Reducing carbon emissions
Removal of 1 tonne of CO2 emissions: **£244**

### Training
1 week level 1,3,4+ training: **£317**

### Volunteering
50 hrs of community project volunteering: **£846**

### Apprenticeships
1 week of T-Level 2.3 or 4 apprenticeships: **£251**

### Employing locally
Employing a long term unemployed person: **£20k+**

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Per kilo of plastic reduction: **£158**

Removing carbon emissions: **£244**

Training: **£317**

Volunteering: **£846**

Apprenticeships: **£251**

Locally employing: **£20k+**
Developing your set of TOMs
Developing a set of TOMs

1. Identify & engage internal stakeholders
2. Review the National TOMs Core (or Light!)
3. Either Map the measures to priorities or use the Light to get started
4. Finalise your TOMs set and engage external stakeholders

The method behind the movement

The National TOMs – Themes, Outcomes and Measures – is a framework for delivering excellence in measuring and reporting social value.

Try using the National TOMs
Social Value in the Procurement Process
The Social Value Procurement Process

Commissioning
- Identify Need
  - Design Solution
  - Agree Brief
  - Stakeholder Engagement

Procurement
- Tender Action
  - Standard social value clauses and wording are included within the ITT.
  - Agreed on project basis: 1. Weightings and sub-weightings 2. Submission deadline

- Submission
  - SQ
  - ITT
  - SVP assesses submissions for outliers & Informs Authority who clarify with bidders. SVP awaits confirmation from Authority that submissions are correct. SVP Completes initial assessment and issues clarifications where required.

- Clarifications
- Evaluation
  - SVP reviews clarifications and informs of any issues. Authority confirms acceptance of scores and includes as part of overall evaluation scores.
  - Council makes award

- Award
  - The Authority contractualises targets and confirms that SVP will be appointed to provide CM support for social value (as per ITT).

Contract Management
- Onboarding
  - SVP engages and onboards supplier.

- Reporting
  - Supplier to present report to the Authority’s contract manager (quarterly).

- Wrap up
  - SVP works with supplier to prepare end of project report (summary of social value outcomes and lessons learned).

Measure & Manage
- SVP supports supplier to submit data on a quarterly basis.

Feedback

socialvalueportal.com | 23
Contract Management – Good Practice

The more you put in at the start the more you’ll get out:

- Pre-market engagement
- Tender documentation – set out working relationship, SV outcomes and measures, provide basis for contractualisation of commitments and enforcement
- Clear expectations on reporting progress of delivery

Importance and clarity:

- The importance organisation places on social value i.e. through weighting
- What the organisation means by social value i.e. by using the TOMs
- Ensuring that social value outcomes are linked to the organisation’s priorities
West Midlands Combined Authority

From the outset of working with SVP, Mayor Andy Street publicly declared their Social Value procurement targets. A bold move, and the first council in the UK to do this.

The solution:
We created a bespoke SVP Programme that firstly advised on the development of a Social Value Policy. The programme supports and procurement and contract management.

The data:
55 Jobs created
8 Jobs for disadvantaged
43 weeks of apprenticeships and training
£115k Local spend
£456k local SME spend
700 weeks support for young people
1,274 hrs community volunteering

25 tenders worth £12.5m
Social Value created £2.5m
Local 42%
VCSE 20%
Total Bidders 264
Social Value 101

Nikki Rowbottom
Senior Consultant, 7 Step Solutions
What is Social Value?

The effect of our impacts on wider economic, social and environmental areas resulting from our actions.
Examples of Social Value …

Social
- Employing a diverse workforce
- Collaborating with VCSE
- Encouraging approaches that encourage wellbeing and mental health

Economic
- Job creation/employing from local community or disadvantaged groups
- Apprenticeships
- Prompt payment through the supply chain
- Advertising subcontracting opportunities to a diverse supply chain

Environmental
- Environmental policy
- Reduction in waste to landfill
- Carbon reduction and offsetting
- Heritage protection
Social Value Act 2012 and PPN 06/20
The Public Services (Social Value) Act 2012

Act was introduced in 2013 requesting that all public bodies consider how what they are buying might improve the social, economic and environmental wellbeing of the immediate community.

Public Procurement Note 06/20

PPN 06/20 makes including and evaluating social value criteria mandatory in over threshold procurements from 1st January 2021.
What do the changes mean?

• Each procurement over PCR15 threshold will have a minimum 10% social value weighting

• Exemptions apply

• Model is simple and consistent across all government organisations

• Social Value defined through priority themes and policy outcomes

• Each outcome has model question, evaluation criteria and reporting metrics
The Public Sector Model
The Public Sector Model

Key Points

- Social Value generated must be relevant to the goods and services being procured
- Social Value generated must be over and above the core deliverables of the contract
- Social Value generated must comply with the principles of equal treatment, non-discrimination and proportionality.

- Model provides ready to use questions, award criteria, sub-criteria and metrics as well as a suggested evaluation scoring model.

- In scope organisations **must** use this model however more mature organisations can develop the questions and criteria

- In scope organisations do not have to use all the themes or outcomes but should consider the key points above
# Themes and Outcomes

<table>
<thead>
<tr>
<th>Themes</th>
<th>Policy Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Theme 1</strong> COVID-19 Recovery</td>
<td>Help local communities to manage and recover from the impact of COVID-19</td>
</tr>
<tr>
<td><strong>Theme 2</strong> Tackling economic recovery</td>
<td>Create new businesses, new jobs and new skills</td>
</tr>
<tr>
<td></td>
<td>Increase supply chain resilience and capacity</td>
</tr>
<tr>
<td><strong>Theme 3</strong> Fighting climate change</td>
<td>Effective stewardship of the environment</td>
</tr>
<tr>
<td><strong>Theme 4</strong> Equal opportunity</td>
<td>Reduce the disability employment gap</td>
</tr>
<tr>
<td></td>
<td>Tackle workforce equality</td>
</tr>
<tr>
<td><strong>Theme 5</strong> Wellbeing</td>
<td>Improve and health and wellbeing</td>
</tr>
<tr>
<td></td>
<td>Improve community cohesion</td>
</tr>
</tbody>
</table>
The Social Value Portal
TOMS
SVP – TOMS

- Operates on a similar methodology to PS Model
- Provides a quantitative value for each outcome
- Central Government Mapping Tool introduced

**5 Themes**

**20 Outcomes**

**40 Measures**

- Covers a wider variety of Social Value outcomes
- Focussed TOMs on various key areas
- Easy measurement of social value

Themes:
- Jobs
- Growth
- Social
- Environment
- Innovation
Q&A

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Thank you