

A Social Value Toolkit for District Councils



Contents

Foreword	Page 3
Introduction	Page 4
Section A: Developing a Social Value Policy	Page 5
Section B: National Social Value Measurement (TOMs) Framework	Page 6
Section C: Including Social Value in Procurements	Page 7
Section D: Contract Management	Page 10
Section E: Remedies	Page 11
Frequently Asked Questions	Page 13
Appendix A: Social Value Policy Template	Page 14
Appendix B: National Themes Outputs and Measures	Page 16

Councillor Peter Fleming OBE

Chairman, LGA Improvement and Innovation Board



Social Value is one of the key themes of the Local Government National Procurement Strategy.

Some Councils have successfully implemented Social Value into their commissioning and procurement processes and are obtaining genuine benefits in areas such as employment, training and healthier communities.

Research by the Local Government Association (LGA) has highlighted that District Councils are finding it difficult to implement Social Value. There are many reasons for this; they don't tend to commission, they have relatively small contract sizes, they procure a low number of contracts, and most districts placing large contracts will do so through national framework agreements.

Where there may be opportunities this Toolkit is welcome. It provides all the information and documentation needed to understand and implement Social Value where it is possible to do so and is based on tried and tested approaches. The Toolkit includes a draft Social Value Policy, information about the TOMs (Themes, Outputs and Measures) framework to enable you to measure Social Value in procurements, wording for inclusion in tender documentation, information on how to evaluate bids and tips on good contract management.

I hope you find this Toolkit useful and that it enables your Council to obtain the benefits that Social Value can provide.

Introduction

What is the Social Value Act?

Social Value refers to the wider financial and non-financial value created by an organisation through its day to day activities in terms of the wellbeing of individuals and communities, social capital created and the environment.

Social Value is defined through the Public Services (Social Value) Act 2012 (Act) which came into force in January 2013 and requires all public sector organisations (and their suppliers) to look beyond the financial cost of a contract and consider how the services they commission and procure might improve the economic, social and environmental well-being of an area.

As local authorities are becoming increasingly financially self-reliant, they are looking at how to make their limited resources go ever further while still maintaining the quality and breadth of services. Social value represents an area where additional community benefits can be derived. As such, it can be seen as a complementary activity to other strategies such as commercialisation organisations may employ.

What are the benefits?

The Act provides a significant opportunity for the public sector to engage with its supply chain by rewarding organisations that go beyond the provision of just the core contract requirements to deliver more value for the community. This can deliver solutions that are the most economically advantageous and will also, over the long term, help to reduce cost and build a more resilient, healthy and economically strong community.

Key benefits include

- Better Value for Money delivering more for the public pound by requiring your suppliers to do more than 'just' deliver the core services
- Increases local spend by rewarding organisations that are local or have a local supply chain, especially SMEs and VCSEs
- Increases opportunities for disadvantaged people and promotes social mobility
- Promotes a responsible supply chain by requiring businesses to compete
- Leads to a cleaner, greener city
- Builds stronger more resilient communities
- Leads to greater innovation and long-term thinking

The Social Value Toolkit for District Councils

This Toolkit has been designed as a starter kit to enable district councils (DCs) to begin to obtain the benefits of Social Value through how they manage and deliver their procurements.

The Social Value Portal recognises that many Councils do not have the resources to be able to implement SV easily. This means that these councils are missing out on delivering real additional value to their communities as laid out in the National Procurement Strategy for Local Government which shows that councils that embed social value into their procurement processes are adding a minimum of +20% value (at no additional cost) providing genuine additional benefits for local communities.

This Toolkit has been designed to provide the information needed to make this journey possible.

If you need any assistance, please contact us at: info@socialvalueportal.com

Section A

Developing a Social Value Policy

A Social Value Policy acts as a ‘golden thread’ between the Council Plan and the Council’s procurements. The Social Value Act states that Social Value requested in procurements must be relevant to the procurement. By having a Social Value Policy in place, everything contained in the Council Plan is relevant to the procurement as set out in Figure A. Bidders for Council tenders can be asked to support delivery of the Council’s objectives as set out in the Council Plan.

We recommend that the Social Value Policy be approved by the Council’s Cabinet or relevant Committee. A draft Social Value Policy Template that Councils can use to enable the ‘golden thread’ to be put in place is set out at Appendix A. The key sections for the Policy would be as follows:

Introduction – Brief overview about context and approach

Background – Reference to the Social Value Act

What is Social Value – Definition of social value

Why is the Council doing this – Benefits to the council and communities of the policy

Policy and legislative context – Links to Council overarching priorities

Delivery – Specific delivery commitments including thresholds and weightings

Review – When and how the policy is reviewed



Figure A: Social Value Policy ‘Golden Thread’

Section B

National Social Value Measurement (TOMs) Framework

The National Social Value Task Force sponsored by the Local Government Association (LGA) and supported by Social Value Portal developed and published the National Social Value Measurement (National TOMs) Framework in 2017. The National TOMs were the culmination of over 18 months consultation with over 40 separate public and private sector stakeholders designed help organisations to identify and measure the social value being delivered through a contract. The aim of the National TOMs Framework is to provide a minimum reporting standard for measuring Social Value. For District Councils it provides an easy to use solution that has been approved by the LGA's National Advisory Group for Procurement, is immediately available and may be applied to any project.

The TOMs are structured around 5 Themes, 17 Outcomes and 35 Measures, hence the name TOMs, that a supplier could provide in addition to the delivery of the core service that they are being engaged for. Typically, this might mean jobs for those furthest from the job market, spend with local SMEs, opportunities for voluntary organisations, environmental improvements and volunteering in the community. Each opportunity is given a value that reflects the fiscal and economic benefits for the community and allow organisations to report their total contribution to society through the contract they are delivering.

The 5 Themes that the TOMs are structured around are as follows:

- **Promoting Skills and Employment:** To promote growth and development opportunities for all within a community and ensure that they have access to opportunities to develop new skills and gain meaningful employment.
- **Supporting the Growth of Responsible Local Businesses:** To provide local businesses with the skills to compete and the opportunity to work as part of public sector and big business supply chains.
- **Creating Healthier, Safer and More Resilient Communities:** To build stronger and deeper relationships with the voluntary and social enterprise sectors whilst continuing to engage and empower citizens.
- **Protecting and Improving our Environment:** To ensure the places where people live and work are cleaner and greener, to promote sustainable procurement and secure the long-term future of our planet.
- **Promoting Social Innovation:** To promote new ideas and find innovative solutions to old

What are the benefits?

The principal benefits of using the National TOMs as your reporting standard are that it:

- Provides a consistent approach to measuring and reporting social value
- Allows for continuous improvement
- Provides a robust, transparent and defensible solution for assessing and awarding tenders
- Allows organisations to compare their own performance by sector and provides industry benchmarks to understand 'what good looks like'
- Reduces the uncertainty surrounding social value measurement for businesses, allowing them to make informed decisions based on robust quantitative assessments and hence embed social value into their corporate strategies

How can the National TOMs be used?

The National TOMs Framework has been designed to help organisations in four principal business activities.

- Measurement and valuation of social value
- Procurement and bid evaluation
- Bid submissions
- Contract Management

The National TOMs are a free resource. They are laid out in Appendix B and can be downloaded here.

Putting a value on 'Social Value'

The National TOMs are supported by a set of 'Proxy Values' that allow users to assess the financial impact that the measures will have on society in terms of fiscal savings and local economic benefits. It is of course recognised that social value is not all about 'money' but nonetheless this is an important metric to help understand the scale and breadth of impact that a measure can make. Importantly, it allows procuring bodies to compare tenders in a way that is proportional and relevant to the bid, and to better justify a procurement decision.

More than just measurement

It is important to measure what has been delivered and to maintain a record of past performance; that is the traditional role of measurement. The National TOMs Framework, however, looks to go much further and has been designed not only to measure what has already been done but also to deliver the change that organisations want to see. In this respect, the TOMs can be viewed as an agent for change and each outcome and measure has been developed to reflect a need and to encourage businesses to become involved in supporting the fulfilment of that need.

Keeping the National TOMs 'Live'

The National TOMs Framework is not a static tool and has to evolve to reflect changing needs and pressures in society. They will be updated on an annual basis. Work on the National TOMs each year starts immediately following release of that year's edition, ready for consultation over the summer and publication in the winter of each year. Any organisation can make representations for additional Outcomes and Measures to be included and these will be debated and analysed by a research advisory board before final approval by the LGA's Social Value Taskforce.



Section C

Including Social Value in Procurements

The Social Value Portal recommends that a stand-alone weighting of 10-20% for Social Value is included alongside the Quality/Price matrix for evaluating procurements to ensure that contractors take social value seriously in their bids. Suggested weightings are shown in Table A below:

Suggested Weightings			
Evaluation Criteria	Where price is important	Where quality of service is important	Where social value opportunity is high
Quality	35%	50-55%	40%
Price	50-55%	35%	45%
Social Value	10-15%	10-15%	15 – 20%

Table A: Suggested social value weightings to be used in bid evaluation

To ensure that Social Value offers from Bidders are treated in an open fair and transparent manner in accordance with the Public Procurement Regulations, the National TOMs as set out in Section B above are used as the basis for enabling bidders to submit their offers and for officers to carry out their evaluation in a fair, open and transparent manner

The table below sets out the principles for this:

Measure & description	Proxy Value	Offer	Total value by measure
No. of new local jobs created	£28,213.00	2	£56,426
No. of apprenticeships (weeks)	£168.00	24	£4,032
No. of volunteering hours	£14.43	50	£722
Carbon dioxide saved	£64.66	50	£3,233
	Total Social Value		£64,413

Table B: Example Social Value Calculation

All bidders are provided with a full menu of the Measures and Values, so that they can select and propose how many activities they are prepared to offer to the council as part of their bid. The total sum of all of the values that the bidder offers represents the overall Social Value offer to the council. In order to ensure that bidders are not simply putting in high SV offers to obtain good scores, bidders should also be required to submit evidence setting out how they will deliver the offer being made and in which year of the contract it will be delivered. For larger value procurements (say over £500K) bidders should also be asked to submit a Delivery Plan.

The Social Value weighting used in the procurement should be further broken down into sub-weightings to enable the both the quantitative as well as the qualitative elements of the offers to be evaluated.

The following example sets out how this might be included in tender documentation assuming Social Value has been weighted 20% of the total quality/price matrix:

Social Value Weightings

Social value should be allocated a weighting of 10-20%, which should be sub-weighted and will be evaluated on the following basis:

Qualitative element of the score: 50% of Social Value Weighting (i.e. 5-10%)

Quantitative element of the score: 50% of Social Value Weighting (i.e. 5-10%)

As your supplier base increases its knowledge and capacity to deliver social value and where there have been pre-tender discussions, then the proportional score for the quantity might be increased.

Capturing Bidders' Offers

An easy way to capture the SV offers from bidders is to use the SVP's Portal which ensures that bidders can upload their SV offers during the procurement process in an open, fair and transparent way. A screenshot from the Portal is set out opposite.

Evaluation

Social value bids should be assessed against the criteria laid out within the ITT based on a combination of a quantitative and qualitative assessment.

Quantitative Assessment: Bidders' quantitative offers should be evaluated based on the highest offer scoring the maximum mark with all of the other offers being scored relative to that where;

$$\frac{\text{Bidder's total Social Value offer}}{\text{Value of the highest Social Value offer from all bidders}} \times 100$$

Qualitative Assessment: The qualitative offers should be evaluated in a similar way to the way in which quality in the rest of the contract is evaluated. A suggested evaluation matrix is outlined opposite.

Total Score

The total Social Value score will be derived from the following calculation:

$$(\text{Quantitative score} * \text{Sub weighting}) + \text{Qualitative score} * \text{sub weighting}) * \text{Overall Social Value Weighting}$$

Contractualisation of SV Offers

It is important that the winning bidder's SV offer is 'contractualised' i.e that it is incorporated as part of the service the Supplier is required to deliver; these commitments will then be monitored and reported on periodically as part of contract management (see Section D).

ITT documentation

Wording to assist Councils to obtain Social Value in procurement ITT documentation is available from the Social Value Portal on request. Please email info@socialvalueportal.com

Total social value score based on selected measures

Question	Unit	Target x Proxy	Subtotal	Description
Jobs: Promote Local Skills and Employment: More local people in employment				
NT1 No. of local people (FTE) employed on contract for one year or the whole duration of the contract, whichever is shorter	no. people FTE	20.00	€30219.00 = €804,380	View Attachments
NT2 % of local people employed on contract (FTE)	%	50.00		View Attachments
Jobs: Promote Local Skills and Employment: More opportunities for disadvantaged people				
NT3 No. of employees (FTE) taken on who are long term unemployed (unemployed for a year or longer)	no. people FTE	3.00	€14701.56 = €44,105	View Attachments
NT4 No. of employees (FTE) taken on who are not in employment, education, or training (NEETs)	no. people FTE		€12442.91	View Attachments

Qualitative Scoring Matrix

Responses to the Social Value qualitative section will be evaluated using the following scoring profile:

Score	Classification
4	Excellent – Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirements and provides comprehensive and clear details of how social value offers made will be delivered. The response provides a high level of certainty that the bidder will deliver their social value commitments.
3	Good – Response is relevant and good. The response addresses all requirements and is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled but includes some ambiguity or minor inconsistencies as to how social value offers made will be delivered. The response provides confidence that the bidder will deliver their social value commitments.
2	Satisfactory – Response is relevant and fair. The response addresses all requirements and demonstrates a fair understanding of the requirements but lacks details on how certain social value offers made will be delivered or contains some inconsistencies. Alternatively, the response fails to address all of the requirements. The response provides some concerns that the bidder will deliver the social value commitment.
1	Poor – Response is partially relevant but generally poor. The response addresses all requirements but contains insufficient/limited detail or explanation to demonstrate how the requirements (or any of them) will be fulfilled or contains major inconsistencies. Alternatively, the response fails to address the majority of the requirements. The response provides significant reservations that the bidder will deliver the social value commitment.
0	Unacceptable – No response submitted, or response fails entirely to demonstrate an ability to meet any of the requirements.

Section D

Contract Management

Ongoing contract management is extremely important to ensure that the Council receives the benefits of Social Value it agreed when it accepted the offer from the supplier.

As set out above, it is important that bidders are requested to identify which elements of their Social Value offers will be delivered in each year of the contract. The contractor should also be asked to provide evidence during contract delivery that the SV offer has been delivered. This helps councils to keep on track on an annual (or more frequent basis) whether offers have been delivered.

The Social Value Portal can assist with this process by ensuring that the winning bidder is required to regularly upload evidence and we provide reporting such as the example set out below to demonstrate progress by the successful contractor in delivering against the agreed targets.



Themes	Measures	Targeted Social Value		Social Value Delivered (24/09/18 - 31/12/18)		Progress Against Targets (RAG)
		No.	£ SVA	No.	£ SVA	
Jobs: Promoting LOCAL Skills & Employment	No. local people (FTE) employed on the contract	1	£26,379	1	£26,379	★
	% of local people employed on the contract (FTE)	70%	-	20%	-	●
	No. apprenticeships on the contract, Levels 2, 3 or 4+	1	£168	1	£168	★
Growth: Supporting Responsible Regional Business	Total amount spent in the local supply chain through the contract (€)	£150,000	£133,500	£50,000	£44,500	●
	% of procurement contracts that include commitments to ethical procurement	100%	-	100%	-	★
Social: Healthier, Safer & More Resilient Communities	Donations or in-kind contributions to local community projects	£10,000	£10,000	£3,000	£3,000	●
Environment: Protecting & Improving our Environment	Car miles saved on the project (hundreds of miles)	0	£0	360 miles	£551	★
	% procurement contracts that include sustainable procurement commitments	25%	-	25%	-	★

Section E

Remedies

Overview

If, during the delivery phase of the contract, it is considered that the SV commitments and actions committed to by a contractor have not been delivered remedies may be sought provided these have been allowed for in the contract. Remedies should be the last course of action once all other routes to resolve the matter have been exhausted.

The recommended steps before actioning remedies include:

- i. Holding discussions with the contractor to discuss non-delivery. It is possible that there has simply been a recording error or that delivery has taken place very recently and the data has not been updated.
- ii. Following discussions, the contract manager may determine that the contractor is positive about completing the outstanding commitment and therefore may agree a revised timescale with the contractor for delivery.
- iii. It may be identified that the contractor has genuinely sought to deliver the SV target but for various reasons has been unable to e.g. the contractor has committed to providing an apprentice from the local area, but no one has been forthcoming who could fill that role. In these circumstances the contract manager may agree to vary the SV commitment from the contractor to another SV target(s) of equivalent proxy value.

A number of attempts should be made to get the contractor to deliver the SV commitment made or a commitment of a similar value. However, if, following meetings and discussions with the contractor (assuming it has been possible to hold such meetings), it is evident that the contractor has no intention of honouring commitments made or agreeing alternatives, then the process for seeking remedies should commence.

Suggested Remedial Procedure

The following approaches may be considered (depending on what potential remedies were included in the original tender documentation).

- i. Determine that the contractor has defaulted against the terms and conditions of the contract and invoke appropriate performance management clauses. Subject to provisions contained within the contract the first step is likely to be to give the contractor formal notification that it is in default and to set out the rectification period that the contractor has to put things right and the consequences of not putting it right;
- ii. If the contractor responds positively and rectifies the issue then no further action need be taken, but in the event the contractor does not respond then any service credits, retentions or other remedies set out in the contract will need to be applied;
- iii. Public sector contracts above a certain value are likely to contain contract termination clauses, although in reality, it is very difficult to apply termination clauses owing to the costs of termination. It is unlikely that a contract would be terminated for a failure to deliver social value commitments.

Remedial Options

The Council may use one of the following techniques to obtain remedies in the event of failure by the contractor to deliver on SV.

Option 1 – Maintain the % SV offer and choose another measure(s)

As a part of their bid, the successful supplier would have submitted a total value score as a % of the contract. This would have been made up of a number of individual measures. If one measure cannot be delivered for reasons outside of the supplier’s control, the supplier may be asked to substitute another measure with the same value to ensure that the total % contribution is the same or similar.

Option 2 - Linking Delivery to Key Performance Indicators (KPIs)

KPIs are used in contracts to monitor the performance of contractors in delivering on tendered commitments. Usually KPIs are a feature of larger value contracts but they could equally be applied in lower value contracts. Generally, a KPI measuring SV delivery would be one of a number of KPIs monitoring/measuring the performance of a contractor across the entire requirements of the contract. A contractor would incur KPI points for failing to meet a target. Each KPI equates to service credits that the contractor would need to deduct from its charges. For each of the indicators, a level of performance is defined, representing the minimum level of service to be provided. The means of measuring performance is also defined, as well as the level and value of service credits to be levied for any possible failure to achieve the minimum levels.

An example of criteria that can be used to assess the performance of the contractor in delivering SV via a Key Performance Indicator (KPI) is set out in Table C.

Table C: KPI template example

KPI [insert KPI number]	Social Value Delivery
Performance Standards:	Social Value was defined and set out by the council organisation in the tender documentation. The contractor committed to delivery of a programme of SV targets during the contract and is required to adhere to this programme. Monitoring against performance will be reviewed at Quarterly meetings with the contractor. In preparation for these meetings the contractor is required to provide details of SV commitments and evidence that they have been delivered.
Performance points:	[XX] points for a failure to deliver on any SV target in any Monitoring Period with a 10-calendar day rectification period.

Option 3 Liquidated damages

The SV Proxy Values from the National TOMS can be used to determine a figure that can be used to equate any non-delivery into liquidated damages. The following is an example of wording that may be used in the tender documentation. Please note that some councils are calculating the actual loss to the council for non-delivery of Social Value rather than using the Social Value proxy values for this purpose. It is recommended therefore that the approach to liquidated damages taken be checked with the Council’s Finance and Legal teams.

“In the event the Contractor is not able to deliver the social value obligation as committed in the tender submission or otherwise commits a breach in that regard during delivery of the contract, the Authority will be entitled to recover the notional value of that SV obligation as Provided in the TOMS Framework”

Frequently asked questions

Question 1

Will Social Value add to contractors' costs?

There is little evidence to suggest that organisations add cost to the project to deliver social value as many companies have already accounted for SV as part of their CSR budgets; if councils are not asking for SV companies will simply provide it to another organisation or use it in other ways. Key steps that Councils need to take to avoid price inflation

- Do not be prescriptive about what you want from your bidders and leave suppliers to make their own decision around relevance and proportionality. If you include a fixed list of required measures within your core service requirements, then it will be costed in by all suppliers
- Social Value is only one evaluation factor in procurement, bidders still needs to demonstrate and win on quality and price and it is important that the relative % weightings used in your evaluation reflect your priorities.

View from a contractor:

“Our social value commitments mean we think about costs decisions that we make anyway. For example, we need to get a supplier on board but let’s get them from the local area or we already provide lunches for everyone but let’s use a social enterprise to provide it or we need apprentices and we have a skills shortage so let’s explore opportunities for people who would not normally be considered e.g. ex-offenders. These things do not cost us more – it’s just about the way in which we do our normal business, but better”

Question 2

SMEs and VCSE organisations find it too complicated and have insufficient resources

With regards to Social Value, local SMEs and VCSEs have a natural advantage as they know what is required in the local area. Where they often struggle is in understanding what the council wants when it asks for Social Value. By using the National TOMs this clearly explains what Social Value means and how they can contribute. Councils should also consider the following

- Providing a Social Value Toolkit for SMEs and VCSEs
- Meet the buyer events to build capacity within the marketplace

Question 3

Social Value is resource intensive and we don’t have the resources to do it

The key to implementing Social Value is to embed it into council procurement processes and to make it as easy as possible to implement to avoid extra work. The Social Value Portal can assist by undertaking the evaluation of SV offers made by bidders and helping track delivery of SV offers during contract management. The benefits are large with councils obtaining a minimum +20% Social Value of contract value.

Question 4

What thresholds should we use?

The thresholds you decide to use should be set to capture approximately 60-80% of your spend. For smaller councils this may be as low as £50,000. Many councils start at £100,000 and then drop to £50,000 when they have more experience. In all cases it is important to support your supplier communities as much as possible.

Appendix A

Social Value Policy Template

[Insert name] District/Borough/City Council Social Value Policy

Introduction

[overview of/background to [insert name] Council]

The Council recognises the important role it can play in enabling Social Value through its procurement activity. In 201[X]/201[Y] we spent approximately [£XX] million via our procurement activity. Through our approach to social value, we will integrate economic, environmental and social sustainability into our procurement processes.

Background

The Public Services (Social Value) Act 2012 came into force in January 2013 cementing the responsibilities of a contracting authority when procuring services contracts subject to public procurement regulations to take into account the “economic, social and environmental well-being of the relevant area” in its procurement activity.

[insert name] Council intends to further commit itself to the Act by going beyond the Act’s requirements and implementing this policy into all aspects of its commercial and procurement activity where it is practicable to do so. In doing this, both the detail and spirit of the Act can be delivered in all council commercial and procurement activity.

What is Social Value?

Social Value has been defined as the additional benefit to the community from a commissioning/procurement process over and above the direct purchasing of goods, services and outcomes.

The Public Services (Social Value) Act 2012 states:

The authority must consider:

- (a) how what is proposed to be procured might improve the economic, social and environmental well-being of the relevant area
- (b) how, in conducting the process of procurement, it might act with a view to securing that improvement.

In order to really deliver social value and have it fully embedded and considered, commissioners must move away from just considering the core service being delivered by a supplier to one that recognises the overall value of outcomes delivered.

Why is [insert name] Council doing this?

Requiring suppliers to deliver social benefits while they deliver the main element of their contract means that there is a magnified benefit for the Council. Incorporating social value into our commissioning and procurement process is not difficult and can make a tangible difference to people in the community, to service delivery and to the council’s spending plans as a whole.

Adoption of this policy can provide the following benefits:

- **Encouraging a diverse base of suppliers**
Promoting supplier diversity; including the participation of small and medium sized enterprises (SME’s) and 3rd sector organisations, and local suppliers in general;
- **Promoting fair employment practices**
Ensuring workforce equality and diversity within supply chains;
- **Meeting targeted recruitment and training needs**
Offering a range of apprenticeship, training and skills development opportunities as well as employment opportunities;
- **Community benefits**
Maximising opportunities for [insert name] organisations to participate in the council’s supply chains and encouraging suppliers to make a social contribution to the local area;
- **Ethical sourcing practices**
Ensuring compliance with UK, EU and international standards, promoting fair trade and fair pricing policies, tackling corruption, child labour, animal welfare, blacklisting of union members and similar social issues; and

- **Promoting greater environmental sustainability**

Minimising waste and pollution, supporting carbon reduction initiatives, furthering energy efficiency and other sustainability programmes.

Policy and legislative context

This Social Value Policy fully supports the council's corporate priorities in:

[set out Councils overarching priorities]

Delivery

In practice this Policy will be applied as follows:

- (i) As a minimum, all procurements over £100,000 will be required to include social value metrics as a part of the scoring and evaluation process. However wherever possible to do so, procurements below this value should also seek social value benefits from contracts.
- (ii) The standard weighting for social value will be a minimum 10% of the overall evaluation score and where it is feasible, this may be higher.
- (iii) The National Themes, Outcomes and Measures (TOMs) measuring tool as agreed by the Local Government Association will be used to capture SV offers from bidders to ensure offers can be evaluated in an open, fair and transparent way
- (iv) Once a procurement exercise is concluded, the responsibility for ensuring the committed social value benefits are actually delivered will fall to those officers responsible for contract management of that individual contract.

Review

[insert name] Council will periodically review its Social Value Policy. In doing so, it will take account of any changes in legislation pertaining to the Public Services (Social Value Act) 2012, the Local Government Act, EU Regulations and any changes to the council's priorities when it is reviewed.

Appendix B

National TOMs

Ref	Measures - Proposed Minimum Requirements	Unit	Proxy's final value (After deadweight has been taken into account where necessary)
NT1	No. of local people (FTE) employed on contract for one year or the whole duration of the contract, whichever is shorter.	no. people FTE	£28,213.00
NT2	% of local people employed on contract (FTE)	%	Record only
NT3	No. of employees (FTE) taken on who are long term unemployed (unemployed for a year or longer)	no. people FTE	£14,701.56
NT4	No. of employees (FTE) taken on who are not in employment, education, or training (NEETs)	no. people FTE	£12,435.62
NT5	No. of employees (FTE) taken on who are rehabilitating young offenders (16-24 yo)	no. people FTE	£14,108.07
NT6	No. of jobs (FTE) created for people with disabilities	no. people FTE	£12,769.68
NT7	No. of hours dedicated to supporting unemployed people into work by providing career mentoring, including mock interviews, CV advice, and careers guidance -(over 24 y.o.)	no. hrs*no. attendees	£94.28
NT8	Local school and college visits e.g. delivering careers talks, curriculum support, literacy support, safety talks (No. hours, includes preparation time)	no. staff hours	£14.43
NT9	No. of training opportunities on contract (BTEC, City & Guilds, NVQ, HNC) that have either been completed during the year, or that will be supported by the organisation to completion in the following years - Level 2,3, or 4+	no.weeks	£234.87
NT10	No. of apprenticeships on the contract that have either been completed during the year, or that will be supported by the organisation to completion in the following years - Level 2,3, or 4+	no.weeks	£168.04
NT11	No. of hours dedicated to support young people into work (e.g. CV advice, mock interviews, careers guidance) - (under 24 y.o.)	no. hrs*no. attendees	£94.28
NT12	No. of weeks spent on meaningful work placements or pre-employment course; 1-6 weeks student placements (unpaid)	no.weeks	£143.94
NT13	Meaningful work placements that pay Minimum or National Living wage according to eligibility - 6 weeks or more (internships)	no.weeks	£143.95
NT14	Total amount (£) spent with VCSEs within your supply chain	£	£0.12
NT15	Provision of expert business advice to VCSEs and SMEs (e.g. financial advice / legal advice / HR advice/HSE)	no. staff expert hours	£84.00
NT16	Equipment or resources donated to VCSEs (£ equivalent value)	£	£1.00
NT17	Number of voluntary hours donated to support VCSEs (excludes expert business advice)	no. staff volunteering hours	£14.43
NT18	Total amount (£) spent in LOCAL supply chain through the contract.	£	0.60
NT19	Total amount (£) spent through contract with LOCAL SMEs	£	0.60

NT20	Demonstrate commitment to work practices that improve staff wellbeing, recognise mental health as an issue and reduce absenteeism due to ill health. Identify time dedicated for wellbeing courses	no. hrs*no. attendees	£95.95
NT21	Diversity training provided for contractors and subcontractors	no. hrs*no. attendees	Record only
NT22	Percentage of procurement contracts that includes commitments to ethical procurement, including to verify anti-slavery and other relevant requirements.	% of contracts	Record only
NT23	Percentage of contracts with the supply chain on which Social Value commitments, measurement and monitoring are required	% of contracts	Record only
NT24	Initiatives aimed at reducing crime (e.g. support for local youth groups, lighting for public spaces, private security, etc.)	£ invested including staff time	£1.00
NT25	Initiatives to be taken to tackle homelessness (supporting temporary housing schemes, etc)	£ invested including staff time	£1.00
NT26	Initiatives taken or supported to engage people in health interventions (e.g. stop smoking, obesity, alcoholism, drugs, etc) or wellbeing initiatives in the community, including physical activities for adults and children.	£ invested including staff time	£1.00
NT27	Initiatives to be taken to support older, disabled and vulnerable people to build stronger community networks (e.g. befriending schemes, digital inclusion clubs)	£ invested including staff time	£1.00
NT28	Donations or in-kind contributions to local community projects (£ & materials)	£ value	£1.00
NT29	No hours volunteering time provided to support local community projects	no. staff volunteering hours	£14.43