The National TOMs for Wales

Briefing Session
August 20th 2020

Social Value Portal – An introduction

The Social Value Portal is the market leader in social value measurement and reporting.

Our management tool helps organisations calculate their social value in terms of environmental, social and economic contributions.

We want to help you to measure, manage and maximise your broader contribution to society.

MEASUREMENT

A nationally approved accounting methodology for measuring social value in terms of economic, environmental and social impact

PROCUREMENT

A procurement platform for social value to help organisations manage the tender process and to unlock social value in the supply chain

CONTRACT MANAGEMENT

An interactive solution designed to help organisations set targets and manage performance and store evidence

REPORTING

Live reporting with interactive dashboards and displays including geospatial mapping of value by area

The TOMs are mapped against the Global Goals

Traction: Public Sector Customers & Suppliers

The National TOMs for Wales – Briefing Session

What have we delivered to date?

The additional value created for communities through the social, economic and environmental inittaives an organisation takes or delivers through its projects

£13.8bn
Total value of contracts through portal to date

£2.1bn
Total local spend

705,000
Total no. volunteering hours unlocked

1,480
Total no. jobs registered for disadvantaged people

+25%
Average % social value delivered across public sector procurements

1,597
Total number of projects under management

Q4 2019

The National TOMs

7th April 2020

Anna McChesney-Gordon
Sol Tannir
Cindy Nadesan

THE SOCIAL VALUE PORTAL

The National Social Value Task Force

The National Social Value Task Force has developed a national measurement solution called the National TOMs (Themes, Outcomes and Measures)

The Task Force is chaired by the Local Government association and supported by Cabinet Office and Crown Commercial Services

Measuring the Impact

- Putting a financial value on outcomes is another way of comparing the benefits arising.

£0?
Salary

On the one hand….

- Happy family
- Good education
- Good CV
- No criminal record

Context and Cultural Background

New Job

£23,119 - £84,866
(£6,616 + £16,503)* (£68,363 + £16,503)**

On the other hand….

- Troubled family
- Left school at 16, no GCSEs
- Petty criminal record, likely to get worse

*Pessimistic scenario: Based on an assumed 9% reduced re-offending rate and 17% re-gaining employment rate for young ex-offenders

**Optimistic scenario: Based on an assumed 93% reduced re-offending rate and 17% re-gaining employment rate for young ex-offenders

Which is worth more and from what perspective – society or the individual?

THE SOCIAL VALUE PORTAL

Proxy building – from theory to practice

National TOMs Proxies

- Developed from benefit analysis techniques as outlined in Treasury Green Book and other relevant public sector guidelines
- Make use of market prices and other monetary valuation techniques
- Disaggregate social and local economic value contributions into following components:
    - Fiscal savings for public purse
    - Economic benefits for individual
    - Broader community and individual wellbeing changes
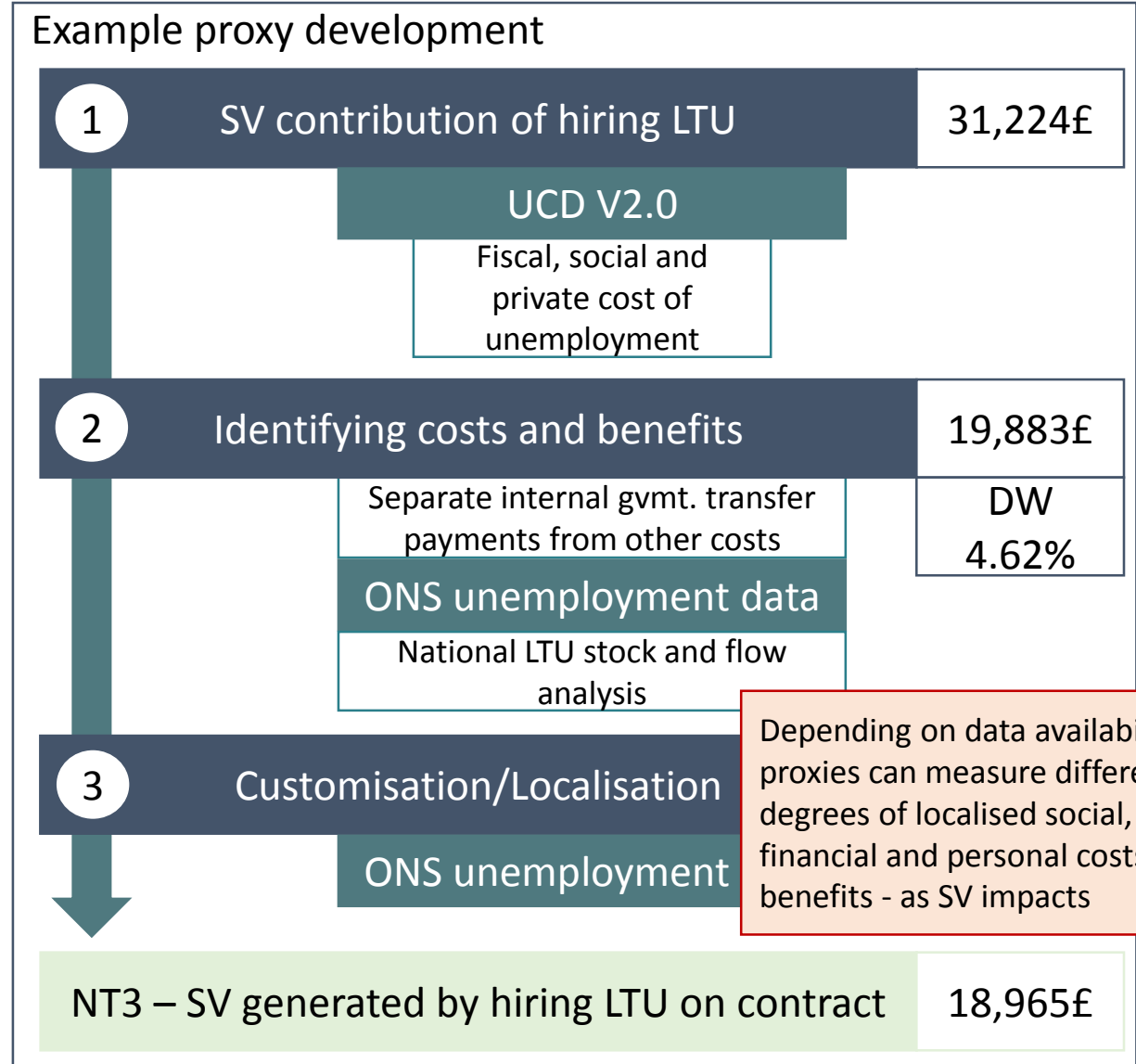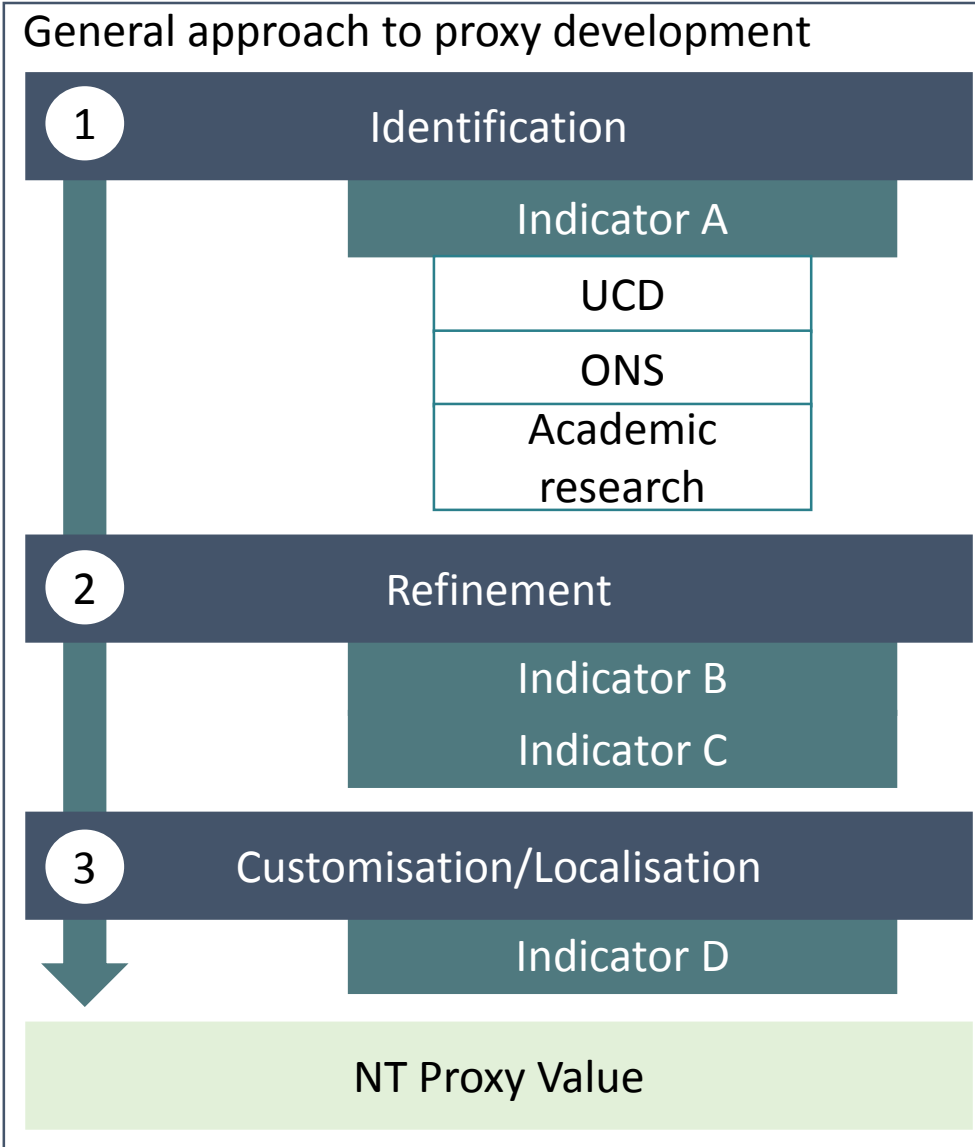- Updated annually

Much of the confusion around social value measurement is generated by people measuring different things

Proxy Maturity

- All Social Value Proxies are categorised to clarify what components of value they capture
    - Inputs (e.g. resources invested or activities)
    - Outputs (e.g. resulting products or services)
    - Outcomes (e.g. resulting immediate direct consequences for beneficiaries)
    - Impacts (broader consequences including wellbeing for individual, communities and societies)
- Each Measure's intervention can be described by a Theory of Change-type model that captures relationships between categories of proxies
- A proxy's maturity is related to how comprehensively it captures the varying components of value relevant to a Measure

THE SOCIAL VALUE PORTAL

Proxy building – from theory to practice

General approach to proxy development

1 Identification

Indicator A

| UCD |
| ONS |
| Academic research |

2 Refinement

Indicator B

Indicator C

3 Customisation/Localisation

Indicator D

NT Proxy Value

Example proxy development

1 SV contribution of hiring LTU — 31,224£

UCD V2.0

Fiscal, social and private cost of unemployment

2 Identifying costs and benefits — 19,883£

Separate internal gvmt. transfer payments from other costs — DW 4.62%

ONS unemployment data

National LTU stock and flow analysis

3 Customisation/Localisation

ONS unemployment

Depending on data availability proxies can measure different degrees of localised social, financial and personal costs and benefits - as SV impacts

NT3 – SV generated by hiring LTU on contract — 18,965£

THE SOCIAL VALUE PORTAL

A Social Value Measurement (& Management) Framework

The Measurement Framework is based in a series of a range Themes, Outcomes and Measures - **The National TOMs**

Theme	Outcome	Measures	Units	Value
Jobs	More local people in employment	No. Young Offenders	No. people	£23,119/pp
Growth	More opportunities for local SMEs and VCSEs	No. Voluntary hours	No. hrs	£16.07/hr
Social	More working with the community	Spend in local supply chain	£ spent	Local Spend
Environment	Vulnerable people are helped to live independently	Reduced CO2e	tCO2e	£69.35/tCo2e
Innovation	Carbon emissions are reduced			
	Air pollution is reduced			

*Total Social Value = Sum(Measures*Value)*

THE SOCIAL VALUE PORTAL

2 years

40 organisations

Public, private and third sector

5 THEMES
20 OUTCOMES
48 MEASURES

ONE MEASUREMENT & REPORTING STANDARD

NATIONAL TOMs

Benefits

- Co-designed with stakeholders based on their measurement needs
- Learning from 2 years of experience and feedback from users
- Provide a consistent measurement solution
- Create a level playing field for business
- Allows benchmarking
- Downloaded over 4000 times
- Has become the default measurement solution
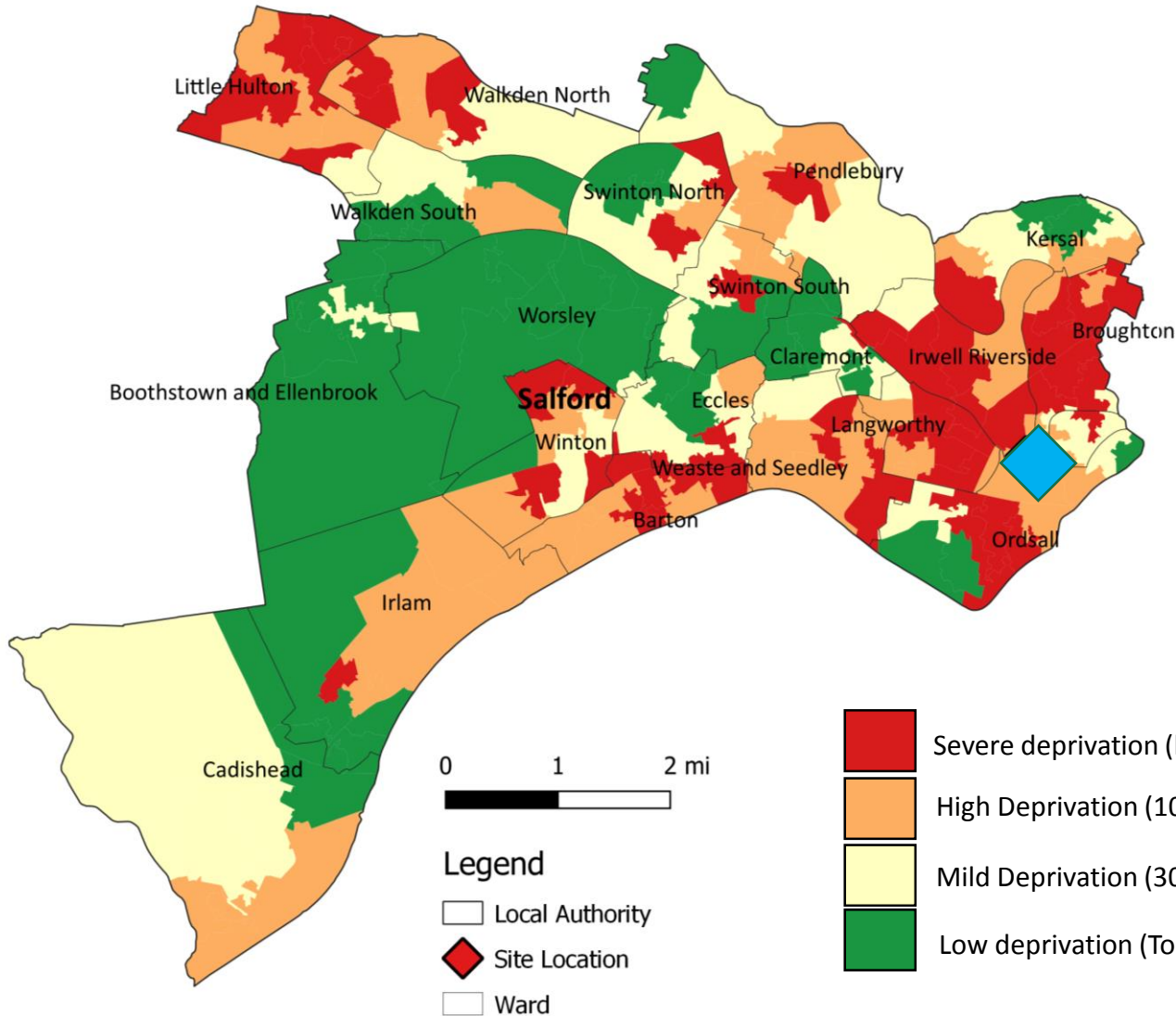- TOMs being mapped against the UN Global Goals for Sustainable Development

THE SOCIAL VALUE PORTAL

National TOMs Framework

Themes and Outcomes

Theme	Outcomes
Jobs: Promote Local Skills and Employment	More local people in employment
	More opportunities for disadvantaged people
	Improved skills
	Improved employability of young people
Growth: Supporting Growth of Responsible Regional Business	More opportunities for local MSMEs and VCSEs
	Improving staff wellbeing and mental health
	Reducing inequalities
	Ethical Procurement is promoted
	Social Value embedded in the supply chain
Social: Healthier, Safer and more Resilient Communities	Creating a healthier community
	Vulnerable people are helped to live independently
	More working with the Community
Environment: Decarbonising and Safeguarding our World	Carbon emissions are reduced
	Air pollution is reduced
	Safeguarding the natural environment
	Sustainable Procurement is promoted
Innovation: Promoting Social Innovation	Social innovation to create local skills and employment
	Social innovation to support responsible business
	Social innovation to enable healthier safer and more resilient communities
	Social innovation to safeguard the environment and respond to the climate emergency

Addressing the needs of communities across the UK

Theme	Outcomes	Ref	Measures - Minimum Requirements	Units	Baseline Proxy Values	Multiplier (1-3)
Jobs: Promote Local Skills and Employment	More local people in employment	NT1	No. of local people (FTE) employed on contract	no. people FTE	£28,213.00	1
		NT2	% of local people employed on contract (FTE)	%	Record only	1
	More opportunities for disadvantaged people	NT3	No. of long term unemployed (FTE) taken on	no. people FTE	£14,701.56	3
		NT4	No. of NEETs employed	no. people FTE	£12,442.91	3
		NT5	No. of rehabilitating young offenders employed	no. people FTE	£14,618.77	1
		NT6	No. of jobs (FTE) created for people with disabilities	no. people FTE	£12,769.68	3
		NT7	No. of hours providing career mentoring	no. hrs*no. attendees	£94.28	1
	Improved skills for local people	NT8	Local school and college visits	no. staff hours	£14.43	2
		NT9	No. of training opportunities on contract	no.weeks	£235.75	2
		NT10	No. of apprenticeships on the contract	no.weeks	£168.04	2
	Improved employability of young people	NT11	No. of hours dedicated to support young people into work	no. hrs*no. attendees	£94.28	1
		NT12	No. of weeks spent on meaningful work placements	no.weeks	£143.94	1
		NT13	Meaningful work placements that pay Minimum wage	no.weeks	£143.95	1
Growth: Supporting Growth of Responsible Regional Business	More opportunities for local SMEs and VCSEs	NT14	Total amount (£) spent with VCSEs within your supply chain	£	£0.12	1
		NT15	Provision of expert business advice to VCSEs and SMEs	no. staff expert hours	£84.00	1
		NT16	Equipment or resources donated to VCSEs	£	£1.00	1
		NT17	Number of voluntary hours donated to support VCSEs	no. volunteering hours	£14.43	1
		NT18	Total amount (£) spent in LOCAL supply chain through contract.	£	£0.60	1
		NT19	Total amount (£) spent through contract with LOCAL SMEs	£	£0.60	1
	Improving staff wellbeing	NT20	Improve staff wellbeing, recognise mental health	no. hrs*no. attendees	£95.95	1
	A workforce that is diverse	NT21	Diversity training	no. hrs*no. attendees	Record only	1
	Ethical Procurement is promoted	NT22	% of contracts incl. commitments to ethical procurement, & anti-slavery	% of contracts	Record only	1
	Social Value in the supply chain	NT23	% of supply chain contracts with Social Value commitments	% of contracts	Record only	1
Social: Healthier, Safer and more Resilient Communities	Crime is reduced	NT24	Initiatives aimed at reducing crime	£ invested & staff time	£1.00	1
	Creating a healthier community	NT25	Initiatives to be taken to tackle homelessness	£ invested & staff time	£1.00	1
		NT26	Initiatives taken or supported to engage people in health interventions	£ invested & staff time	£1.00	1
	Vulnerable people helped to live independently	NT27	Initiatives to be taken to support older, disabled & vulnerable	£ invested &staff time	£1.00	1
	More working with the Community	NT28	Donations or in-kind contributions to local community projects	£ value	£1.00	1
		NT29	No hours volunteering time provided to support local community projects	no. staff volunteering hours	£14.43	1
		NT30	Support provided to help local community draw up their own Stakeholder Plan	£ invested & staff time	£1.00	1
Environment: Protecting and Improving Our Environment	Climate Impacts are reduced	NT31	Savings in CO2 emissions on contract not from transport	tonnes CO2e	£64.66	1
	Air pollution is reduced	NT32	Car miles saved on the project (e.g. cycle to work programmes)	hundreds of miles saved	£1.53	1
		NT33	Number of low or no emission staff vehicles included on project	hundreds of miles driven	£0.67	1
	Better places to live	NT34	Voluntary time dedicated to management of green infrastructure	no. staff volunteering hours	£14.43	1
	Sustainable Procurement is promoted	NT35	% of contracts that includes sustainable procurement commitments	% of contracts	Record only	1
Innovation: Promoting Social Innovation	Other measures (TBD)	NT36	Other measures (£)	£	£1.00	1
		NT37	Other measures (hrs)	no. staff expert hours	£84.00	1
		NT38	Other measures (hrs)	no. staff volunteering hours	£14.43	1

Responding to local needs

Local Skills and Employment: Salford

NEETs (% of KS5 Leavers) — 150%

Long term claimants of Jobseeker's Allowance — 112%

Healthier, Safer and More Resilient Communities: Salford

Rough Sleepers rate (per 1,000 Households) — 314.1%

Admission episodes for alcohol-specific conditions (Per 100,000) — 185.8%

% of school pupils with social, emotional and mental health needs — 161.2%

First Time Young Offenders — 140.1%
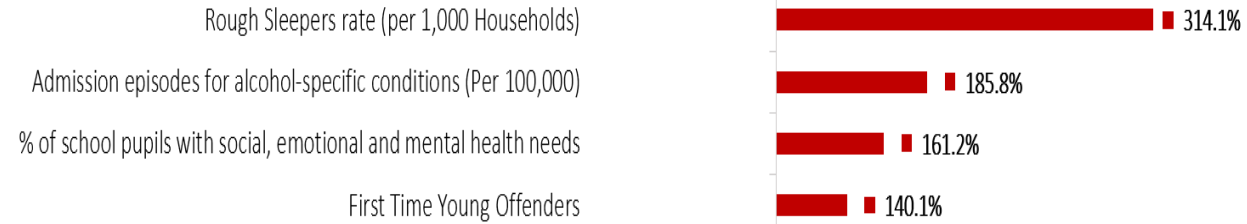
Better than the North West Average   Worse than the North West Average

Legend

Severe deprivation (bottom 10%)

High Deprivation (10-30%)

Mild Deprivation (30-50%)

Low deprivation (Top 50%)

Local Authority

Site Location

Ward

THE SOCIAL VALUE PORTAL

Theme	Outcomes	Ref	Measures - Minimum Requirements	Units	Baseline Proxy Values	Multiplier (1-3)
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		NT19	Total amount (£) spent through contract with LOCAL SMEs	£	£0.60	1
		NT20	Improve staff wellbeing, recognise mental health	no. hrs*no. attendees	£95.95	1
		NT21	Diversity training	no. hrs*no. attendees	Record only	1
		NT22	% of contracts incl. commitments to ethical procurement, & anti-slavery	% of contracts	Record only	1
		NT23	% of supply chain contracts with Social Value commitments	% of contracts	Record only	1
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We can use weightings to signal to your priority areas

Measures can be tailored to reflect specific local challenges

THE SOCIAL VALUE PORTAL

Getting Maximum Social Value from Commissioning and Procurements

THE
SOCIAL
VALUE
PORTAL

The Social Value Act

The Social Value Act is transforming the relationship between business and the public sector – what more can business do?

How are Councils applying the Act?

- SCOPE: Generally being embedded across goods, works, services

- THRESHOLDS: All contracts above a minimum threshold of £50,000 (Bristol is at £25,000)

- WEIGHTINGS: These vary, but leading Councils moving toward standalone

    - Manchester OVER 20%
    - Bristol 15%
    - WMCA 15%
    - Islington Council 10%

- PLANNING: Leading councils such as Islington and Coventry are now looking at how social value may be integrated into planning

+25%

THE SOCIAL VALUE PORTAL

Public Procurement Case Study

Solihull Metropolitan Borough Council (SMBC) sought to replace tills in approximately 70 secondary and primary schools, to be managed by Solihull Catering Service.

The contract involves delivery, installation, ongoing maintenance and training. Both leasing and purchasing options were considered.

SMBC was looking for a hands-on approach when it comes to implementation so that deadlines are met and a continuing relationship that is both innovative and forward-looking throughout the period of the contract.

The contract was suitable for delivery by a VCSE or SME.

Est. Contract Value: £250-500k

Contract Term: 5 years (+3 year extension option)

SMBC School Tills Contract – Award Criteria

SMBC are weighting social value at 5-20%, depending on contract type.

For the School Tills contract social value was weighted at 15%, as a standalone evaluation criteria.

Quality	40%	
Price	45%	
Social Value	15%	
	Qualitative	Quantitative
	7.5%	7.5%
TOTAL	100%	

THE SOCIAL VALUE PORTAL

6 social value proposals were submitted, 1 bidder chose not to commit SV targets. These showed that there was no correlation between a high social value bid and a higher financial proposal.

Contract Value v Target Social Value
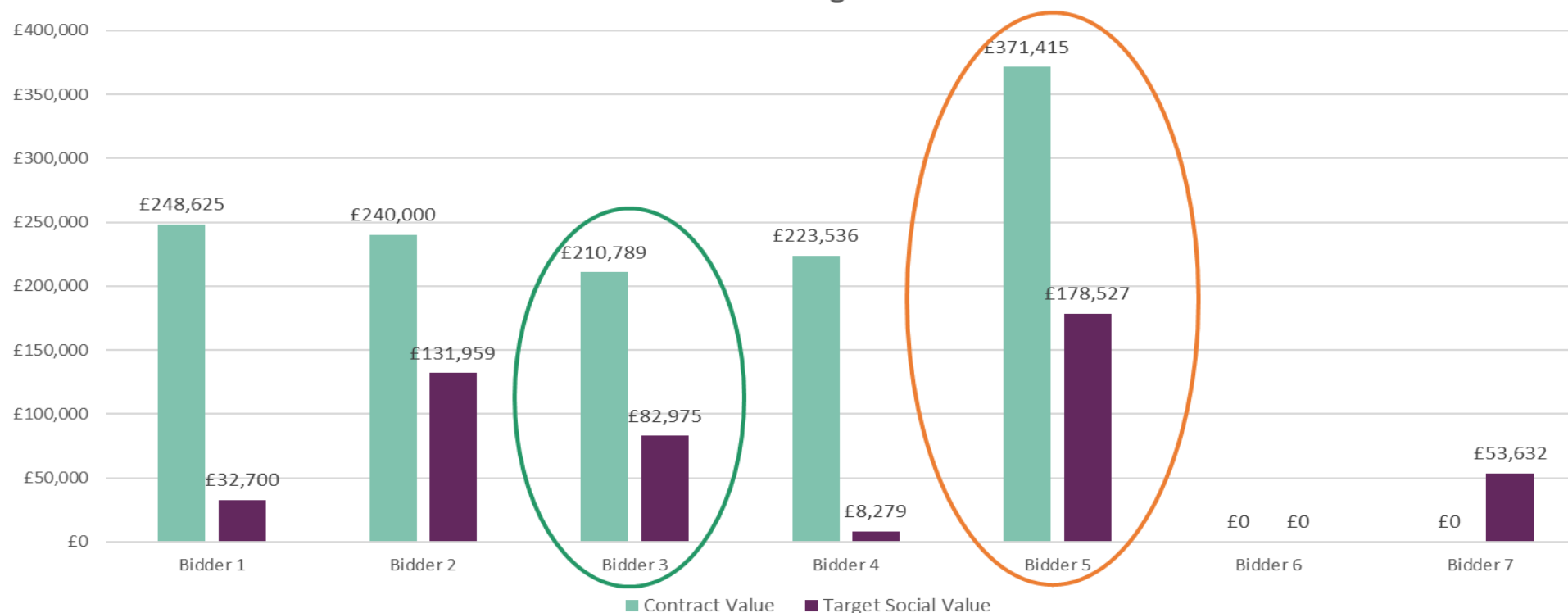
Bidder 3 won the project due to best combination of price, quality and social value

Bidder 5 ranked highest in the scoring of social value

National TOMs for Wales

Working Group – TOMs Taskforce

Steve Robinson- Cardiff Council – Chair#

Richard Dooner - WLGA

Guy Battle - Social Value Portal

Philip Cyrus – Social Value Portal

Sarah Jane Waith – Transport for Wales

Natalie Rees Transport for Wales

KJ Morgan – Cardiff University

Olivia Hughes - Flintshire Council

Brendan Burke - Welsh Government

Jackie Kay – Welsh Government

Gemma llis - RCTCBC

Marion Stapleton- Welsh Government

Karen Bellis - Denbighshire

Vincent Hanly - Powys.gov.uk;

Scott James - Monmouthshire.gov.uk;

Alice – FG Procurement Commission

Nick Abbott - linc-cymru.co.uk;

Jim Allen - tuc.org.uk;

Stuart - sustainablesupplychainsltd.co.uk

Alicja Slawik - Cardiff Council

Hayley MacNamara - chcymru

Helen Hapgood - wwha.co.uk;

Kimberley Mason - Denbighshire Council

Evans Arwel – Gwynedd Llyw Cymru

Andrew Gooding – Caerphilly Council

Justine Scorrer - Linc-Cmru

The National TOMs for Wales are based on the learnings from the National TOMs but reflect the specific requirements of the Commissioner and the WBFG Act <u>AND</u> Welsh Government Community Benefits Programme

- Provides a single set of measures for public organisations to report against

- Create a level (and consistent) playing field for the supply chain

- Based on non-financial performance but allow ££ value to be reported

- Allows comparison and benchmarking – what does 'good look like'?
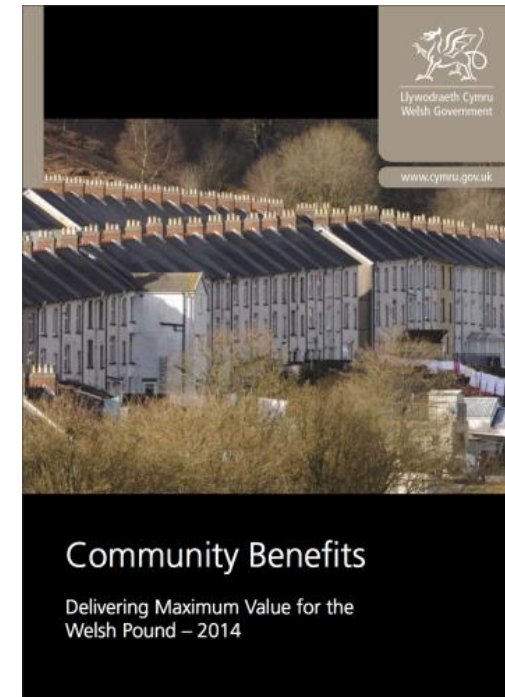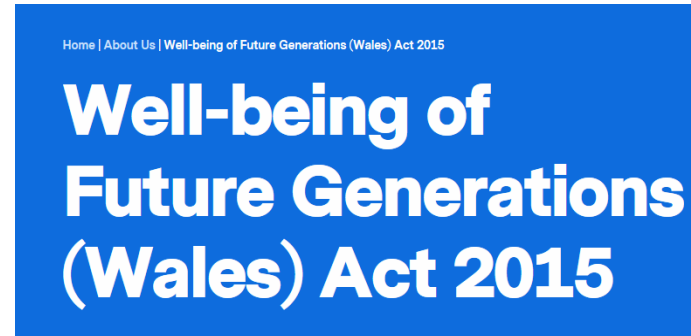
7 Goals
32 OUTCOMES
92 MEASURES

ONE MEASUREMENT &
REPORTING STANDARD

Benefits
- Co-designed with stakeholders based on their measurement needs
- Provide a consistent measurement solution
- Create a level playing field for business
- Allows benchmarking
- Allows reporting against the WBFG Act

THE SOCIAL VALUE PORTAL

Themes (Goals)	Outcomes
A prosperous Wales An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.	**More people in employment**
	Improved skills for people
	Improved skills for a low carbon transition
	More opportunities for SMEs
	Resource efficiency and the circular economy are promoted
	Innovation to support a more prosperous Wales
	Retaining jobs and skills during the COVID-19 crisis
A globally responsible Wales A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being	**Carbon Emissions are reduced**
	Ethical procurement is promoted globally
	Innovation to support a globally responsible Wales
	COVID-19 environmental response
A resilient Wales A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change	**Green spaces and biodiverity are protected and enhanced**
	Safeguarding the environment
	Sustainable procurement is promoted
	Innovation to support a more resilient Wales
A healthier Wales A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood	**Creating a healthier community**
	Air Pollution is reduced
	Improving staff wellbeing
	Innovation to support a healthier Wales
	Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

THE SOCIAL VALUE PORTAL

Themes (Goals)	Outcomes
A more equal Wales A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic circumstances)	**More opportunities for disadvantaged people**
	Reducing inequalities
	More support for target curriculum activities
	Improved employability of young people
	Ethical procurement is promoted in Wales
	Innovation for a more equal Wales
A Wales of cohesive communities Attractive, safe, viable and well-connected.	**More opportunities for VCSEs (Voluntary, Community and Social Enterprises)**
	Social Value embedded in the supply chain
	A workforce and culture that reflect the diversity of the local community
	Crime is reduced
	Vulnerable people helped to live independently
	More working with the Community
	Innovation to support more cohesive communitie sin Wales
	Supporting workers, SMEs and VCSEs to face the COVID-19 crisis
	Supporting communities to deal with the COVID-19 crisis
A Wales of vibrant shared culture and thriving Welsh Language	**The Welsh Cuture is promoted**
	Native wildlife, nature and heritage sites are protected
	Innovation to support a more vibrant culture

THE SOCIAL VALUE PORTAL

Theme	Outcomes	Relevant well-being objective	NT Ref	FG#	New WT Ref	Measure	Unit
A prosperous Wales	**More people in employment**		NT1	21	NTW1	No. of local direct employees (FTE) hired or retained (for re-tendered contracts) on contract for one year or the whole duration of the contract, whichever is shorter	no. people FTE
			NT1a		NTW1a	No. of local direct employees (FTE) which are TUPE transfers retained on contract for one year or the whole duration of the contract, whichever is shorter (re-tendered contracts only - to be used at Measurement)	no. people FTE
			NT1b		NTW1b	No. of residents (FTE) from the listed sub-localities employed directly or through the supply chain as a result of your procurement requirements on the contract for one year or the whole duration of the contract, whichever is shorter (see sub-localities listed in 'LISTNT1b')	no. people FTE
			NT1c		NTW1c	No. of local people (FTE) on contract for one year or the whole duration of the contract, whichever is shorter, employed through the supply chain as a result of your procurement requirements	no. people FTE
			NT2	21	NTW2	No. of local direct employees (FTE) hired or retained (for re-tendered contracts) on contract for one year or the whole duration of the contract, whichever is shorter	%
	Improved skills for people	**EXAMPLE: Equip everyone with the right skills for a changing world (WG)**	NT8	7a	NTW3	No. of staff hours spent on local school and college visits e.g. delivering careers talks, curriculum support, literacy support, safety talks (including preparation time)	no. staff hours
			NT9	8	NTW4	No. of weeks of training opportunities on the contract (BTEC, City & Guilds, NVQ, HNC) that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+	no.weeks
			NT10	8	NTW5	No. of weeks of apprenticeships on the contract that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+	no.weeks

THE SOCIAL VALUE PORTAL

The National TOMs for Wales – Briefing Session

Key	Issue or Review by date							
	Meeting date							

Ref	Item	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Comment
1	Launch National TOMs for Wales								
2	Kick off meeting	2nd							
3	Review Draft V3 (no proxies)	By 24th	By 8th						We have extended the consultation for those who cannot make meeting 1. Meeting 2 will be the same format, but giving people a bit more time if needed
4	Line by line review (meeting 1)	30th							
5	Line by line review (meeting 2)		13th						
6	Draft V7 (with proxies)		22nd						
7	Review and Comments			By 12th					
8	Review Meeting/Discussion			16th					
9	Draft V8			26th					
10	Regional consultation					28th			
11	Pilot projects								Could be new OR retropective projects
12	Review Meeting/Discussion						10th		
13	Final Draft National TOMs for Wales						By 25th		
14	Preparation of Supporting docs						By 25th		
15	Review Meeting/Discussion							1st	
16	Final Publication							13th	

THE SOCIAL VALUE PORTAL

Discussion & NEXT STEPS

The National TOMs for Wales – Briefing Session

THE SOCIAL VALUE PORTAL