MEASURING SOCIAL VALUE WITH THE NATIONAL TOMS FRAMEWORK

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Using the Portal to tell the Social Value story

National Social Value Conference 2020

Nathan Goode, Social Value Portal

29 January 2020
Examples of how the measurement framework is being used on the Portal
# Meeting procurement targets

## Supplier reporting

**Commitments & Delivered Social Value**

<table>
<thead>
<tr>
<th>Theme</th>
<th>Reference</th>
<th>Question</th>
<th>Units</th>
<th>Answer</th>
<th>Target_Social_Value</th>
<th>Actual_Social_Value</th>
<th>SVProgress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs</td>
<td>NT1</td>
<td>No. of local people (FTE) employed on contract for one year or the whole duration of the contract, whichever is shorter.</td>
<td>no. people FTE</td>
<td>1</td>
<td>£26,379.00</td>
<td>£52,758.00</td>
<td>200.00%</td>
</tr>
<tr>
<td>Jobs</td>
<td>NT2</td>
<td>% of local people employed on contract (FTE)</td>
<td>%</td>
<td>37.5</td>
<td>£0.00</td>
<td>£0.00</td>
<td>266.67%</td>
</tr>
<tr>
<td>Growth</td>
<td>NT17</td>
<td>Number of voluntary hours donated to support VCSEs (excludes expert business advice)</td>
<td>no. voluntary hrs</td>
<td>8</td>
<td>£115.44</td>
<td>£288.60</td>
<td>250.00%</td>
</tr>
</tbody>
</table>

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4 SVP Portal presentation January 2020
LA Purchasing Consortium

Social value data at scale

ACCOUNT HIERARCHY

Consortium Account

Local Authority Accounts

New Contracts/Tenders/Projects may be added at each level of the Account Hierarchy by the Primary account owner.

(166) Projects
## Bespoke measures

### Housing Association

<table>
<thead>
<tr>
<th>Question</th>
<th>Units</th>
<th>Proxy</th>
<th>Response</th>
<th>SVA (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengthening Society: We contribute to people’s wellbeing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SB1 No. of people who experienced an increase in confidence as a result of the programme</td>
<td>no. people</td>
<td>£0.00</td>
<td>0.00</td>
<td>£0.00</td>
</tr>
<tr>
<td>SB2 % of people who experienced an increase in confidence as a result of the programme</td>
<td>%</td>
<td>£0.00</td>
<td>0.00</td>
<td>£0.00</td>
</tr>
<tr>
<td>SB3 No. of people who experienced decreased stress or anxiety as a result of the programme</td>
<td>no. people</td>
<td>£0.00</td>
<td>0.00</td>
<td>£0.00</td>
</tr>
<tr>
<td>SB4 % of people who experienced decreased stress or anxiety after the programme</td>
<td>%</td>
<td>£0.00</td>
<td>0.00</td>
<td>£0.00</td>
</tr>
<tr>
<td>SB5 No. of people who felt better able to take control of their lives as a result of the programme</td>
<td>no. people</td>
<td>£0.00</td>
<td>0.00</td>
<td>£0.00</td>
</tr>
<tr>
<td>SB6 % of people who felt better able to take control of their lives as a result of the programme</td>
<td>%</td>
<td>£0.00</td>
<td>0.00</td>
<td>£0.00</td>
</tr>
<tr>
<td>SB7 No. of people who felt more positive about their indoor living environment as a result of the programme</td>
<td>no. people</td>
<td>£0.00</td>
<td>0.00</td>
<td>£0.00</td>
</tr>
</tbody>
</table>
Charitable donations and volunteering

**Asset owner**

### ACCOUNT SUMMARY

- **Total Committed Social Value:** £0.00
- **Total Delivered Social Value:** £4,404,240.36
- **Delivered Social Value Add(%):**
- **Enter Contract Values**
- **Progress Against Targets(%):** n/a

### EXPORT ACCOUNT DATA

Download your project summary data below in CSV format. The Detailed Report includes the responses from all suppliers.

- **Account Summary Report - All**
- **Account Summary Reports by Project Type:**
  - Bid Only
  - Measure Only
  - Manage Only

Click 'Export Details' button on report page to download.

### ACCOUNT HIERARCHY

- Charity Partnerships
- Community Employment
- Education
- Volunteering
Providing the evidence

**Contractor**

*Estimated based on 173,638 hrs worked*

- =21,735 Days (8hr/day)
- =4,341 week (5days/wk)
- =93 people over 2 years (47 working weeks a year)

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| Employment, Skills & Local Economy: People are employed from local area |
|---|---|---|
| 1.9 Number of months of classified advertisements taken out for local people for the purpose of this contract (e.g. of local job centres) | no. | £190.00 |
| 1.10 Number of local people employed on the contract, as per the definition of local defined for this contract | no. people | £28213.00 |

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**Social**

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**Local**

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Regional reporting

Professional Services firm
DESIGNING THE TOMs 2.0

Proactive **agent of change**
Unlocking **social value**
Empowering **communities**
Mobilising **resources**

Co-designed with stakeholders based on their measurement needs
Learning from 2 years of experience and feedback from users
HOW SHOULD WE EXTEND THE FRAMEWORK?

Open for users and not users

➢ Areas of Measurement
➢ Functionalities
BEGINNER - 42%
MATURE - 24%
LEADER - 10%
INNOVATOR - 9%

Embedding social value at...
➢ PROCUREMENT, MANAGEMENT AND MEASUREMENT - 75%
➢ MANAGEMENT AND MEASUREMENT ONLY - 19%
➢ PROCUREMENT ONLY - 10%

Sector
59% PUBLIC
30% PRIVATE
11% VCSE/THIRD SECTOR
WHAT ISSUES DO YOU URGENTLY NEED A SOCIAL VALUE MEASUREMENT SOLUTION FOR?

Circular economy
Environmental conservation - biodiversity preservation
SME spend
Sustainable Supply Chains
Quality of jobs, wellbeing and mental health at work
Spend in the most deprived areas
Personal wellbeing (life satisfaction, worthwhile, happiness, anxiety)
Homelessness
Employing care leavers
Eradicating modern slavery

TOP 10
10 Measures added to the National TOMs Minimum reporting standard

Additional lists of Measures both for the National TOMs (+38) and Real Estate Plug In (+19)

More guidance around use at procurement

5 THEMES
20 OUTCOMES
48 MEASURES

ONE MEASUREMENT & REPORTING STANDARD

Addressing the needs of communities across the UK

REAL ESTATE PLUG IN

Planning · construction · occupation
More local people in employment
More opportunities for disadvantaged people
Improved skills
Improved skills for disadvantaged people
Improved skills for a low carbon transition
Improved employability of young people
More opportunities for local MSMEs and VCSEs
Improving staff wellbeing and mental health
Reducing inequalities
Ethical Procurement is promoted
Cyber security risks are reduced
Social Value embedded in the supply chain

Carbon emissions are reduced
Air pollution is reduced
Safeguarding the natural environment
Resource efficiency and circular economy solutions are promoted
Sustainable Procurement is promoted
Crime is reduced
Creating a healthier community
Vulnerable people are helped to live independently
More working with the Community
Our Occupiers are more satisfied
More buildings are certified
Social innovation promoted across the four Themes
# National TOMs
Minimum Reporting Standard

<table>
<thead>
<tr>
<th>THEMES</th>
<th>OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>JOBS: PROMOTING LOCAL SKILLS &amp; EMPLOYMENT</strong></td>
<td>More local people in employment</td>
</tr>
<tr>
<td></td>
<td>More opportunities for disadvantaged people</td>
</tr>
<tr>
<td></td>
<td>Improved skills</td>
</tr>
<tr>
<td></td>
<td>Improved employability of young people</td>
</tr>
<tr>
<td></td>
<td>More opportunities for local SMEs and VCSEs</td>
</tr>
<tr>
<td></td>
<td>Improving staff wellbeing and mental health</td>
</tr>
<tr>
<td></td>
<td>Reducing inequalities</td>
</tr>
<tr>
<td></td>
<td>Ethical Procurement is promoted</td>
</tr>
<tr>
<td></td>
<td>Social Value embedded in the supply chain</td>
</tr>
<tr>
<td></td>
<td>Creating a healthier community</td>
</tr>
<tr>
<td><strong>GROWTH: SUPPORTING GROWTH OF RESPONSIBLE REGIONAL BUSINESS</strong></td>
<td>Vulnerable people are helped to live independently</td>
</tr>
<tr>
<td></td>
<td>More working with the Community</td>
</tr>
<tr>
<td></td>
<td>Carbon emissions are reduced</td>
</tr>
<tr>
<td></td>
<td>Air pollution is reduced</td>
</tr>
<tr>
<td></td>
<td>Safeguarding the natural environment</td>
</tr>
<tr>
<td></td>
<td>Sustainable procurement is promoted</td>
</tr>
<tr>
<td><strong>SOCIAL: HEALTHIER, SAFER &amp; MORE RESILIENT COMMUNITIES</strong></td>
<td>Promoting social innovation across Themes (4 outcomes)</td>
</tr>
<tr>
<td><strong>ENVIRONMENT: DECARBONISING &amp; SAFEGUARDING OUR WORLD</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Environmental Measures

**National TOMs (core) and RE (core)**

<table>
<thead>
<tr>
<th>NT31</th>
<th>Savings in CO2 emissions on contract-achieved through de-carbonisation (specify how these are to be achieved).</th>
</tr>
</thead>
<tbody>
<tr>
<td>NT44</td>
<td>Policy and programme to achieve net zero carbon by 2030 including monitoring plan with specific milestones (Issued or to be issued by the end of 2020)</td>
</tr>
<tr>
<td>RE39</td>
<td>RE39 Carbon savings from energy efficiency measures on site (e.g. increased use of renewables)</td>
</tr>
<tr>
<td>RE40</td>
<td>Embodied Carbon reductions in CO2e emissions against baseline.</td>
</tr>
<tr>
<td>RE61</td>
<td>Offset embodied carbon emissions from construction material</td>
</tr>
<tr>
<td>RE62</td>
<td>Carbon offset fund payments against new developments (payments into external carbon offset funds e.g. through S106)</td>
</tr>
<tr>
<td>NT45</td>
<td>Carbon Certification (Carbon Trust Standard, Planet Mark or equivalent independently verified) - achieved or to achieve for current year</td>
</tr>
<tr>
<td>NT46</td>
<td>Corporate travel schemes available to employees on the contract (subsidised public transport, subsidised cycling schemes, sustainable corporate transport (e.g. electric bus from public station to corporate facilities),</td>
</tr>
<tr>
<td>NT65</td>
<td>RE63 Fleet or construction vehicles on the contract that is at Least Euro 6 or LEV</td>
</tr>
<tr>
<td>NT66</td>
<td>RE64 Fleet emissions monitoring programme on the contract, including data collection (miles, type of vehicle, engine type)</td>
</tr>
<tr>
<td>RE65</td>
<td>Offsets or mitigation initiatives on biodiversity delivered whenever restoration is not available, and when implement quality benefits.</td>
</tr>
<tr>
<td>NT47</td>
<td>Donations or investments towards expert designed sustainable reforestation or afforestation initiatives</td>
</tr>
<tr>
<td>RE68</td>
<td>RE69 Waste management verification policies: audit hierarchy, downstream audits for waste stream</td>
</tr>
<tr>
<td>RE63</td>
<td>Percentage of procurement contracts that includes sustainable procurement commitments or other relevant requirements and certifications (e.g. to use local produce, reduce food waste, and keep resources in circulation longer.)</td>
</tr>
<tr>
<td>RE45</td>
<td>RE46 Supply Chain Carbon Certification (Carbon Trust Standard for Supply Chain or equivalent independently verified) - achieved or to achieve for current year</td>
</tr>
<tr>
<td>NT35</td>
<td>Requirements or support (for Micro or Small enterprises) for suppliers to demonstrate climate change and carbon reduction training for all staff - e.g. SDGs Academy courses (NTs) or (e.g. RE) Supply Chain Sustainability School bronze or higher or equivalent</td>
</tr>
</tbody>
</table>

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**Additional Set; circular economy, plastic recycling, etc**

- Proactive use through prioritisation and incentives to innovate

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The new Calculator

➢ New guidance on how to set up the TOMs and use them at procurement, contract management and measurement

Using the National TOMs Social Value Calculator

Contents

Introduction to the National TOMs Social Value Calculator
Setting up the Calculator for procurement – step by step
Setting up the Calculator for measurement and contract management – step by step

Setting up and using the Calculator for procurement – step by step

The procuring organisation (PO) needs to customise the TOMs for the contract before they are included in the tender documentation. To do so they can use the ‘Set up’ tab and the ‘Prioritisation column’ in the Procurement Calculator tab, where they can

1. Customise the set of selected Measures from the National TOMs included on the contract (e.g. add additional Measures found in the National TOMs Additional Measures, or Real Estate Plug In and Additional Measures)
2. Add additional Outcomes and Measures to the list that the PO wants bidders to make commitments against – e.g. Interventions identified through stakeholder engagement (see Needs and Priorities survey) ²
3. Select a definition for the local area (e.g. the local authority, or a 10-20-30 miles radius area around a construction site) ²

➢ More detailed guidance at procurement for each Measure: Target Guidance / Unit Guidance

New Functionalities
TAKING THE AGENDA FORWARD

Clear brief around environmental issues and good work
National TOMs 2020 as a first step
NSVT - Climate emergency working group and Good work group

National TOMs and the SGDs
The local approach to the Sustainable Development Goals

Dr. Emily Clough
Lecturer in Politics
Newcastle University
What are the Sustainable Development Goals?

- Developed by the UN as a follow-on from the Millenium Development Goals
- 17 Goals, 169 targets, to be achieved by 2030
- Basic principles:
  - Universality
  - No one left behind
  - Coherence between the goals
- Monitored through Voluntary National Review (VNR)
Cities and local government are key to the SDGs

- Inclusion of Goal 11: Sustainable Cities and Communities
- Organisations such as United Cities and Local Governments (UCLG) and Local Governments for Sustainability (ICLEI)
- Explicit call for representation of local governments at SDG-related forums
Why engage with the SDGs?

- Opportunity for engagement on a global scale
- Showcase unique policies/programmes/actions on behalf of your local area
- Highlight need for better resource
- Argue for greater power/responsibility
How are cities responding to the UN SDGs—Global and UK?

Two different approaches:

Bristol:
Voluntary Local Review (VLR)
-details of progress against each SDG, including extensive indicators and case studies

London:
50-60 indicators
Overall picture of progress, specific themes developed in more depth
Ways to approach the narrowing down of the target/indicator set

- Policy coherence
- Data availability
- Stakeholder engagement
- Highlight areas of strength
- Assess/engage with challenges
<table>
<thead>
<tr>
<th>SDG target</th>
<th>London (proposed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1: End hunger and ensure access to food for everyone</td>
<td>Food security (disaggregated by adults/children)</td>
</tr>
<tr>
<td>2.2: End all forms of malnutrition</td>
<td>Under and overweight children, adult obesity</td>
</tr>
<tr>
<td>2.3 Double agricultural productivity and incomes of small scale producers</td>
<td>Not included—not a large enough sample in London</td>
</tr>
<tr>
<td>2.4 Ensure sustainable food production systems and implement resilient</td>
<td>Not included—worth thinking about London’s place in the food chain</td>
</tr>
<tr>
<td>agricultural practices</td>
<td></td>
</tr>
<tr>
<td>2.5 Maintain the genetic diversity of seeds, cultivated plants and farmed</td>
<td>Not included</td>
</tr>
<tr>
<td>and domesticated animals</td>
<td></td>
</tr>
</tbody>
</table>
Sources of data

• University of Bristol Voluntary Local Review (VLR) handbook
• ONS SDG Hub (Github)
PANEL DISCUSSION:
MEASURING SOCIAL VALUE WITH THE NATIONAL TOMS FRAMEWORK

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