







#### **Chair's Introduction**

#### Andrew van Doorn Chief Executive HACT



The Policy Framework...



#### **Social Value: Context & Future Direction**

Ben Carpenter Chief Executive Social Value UK



#### Engineering Social Value

Ben Carpenter | Leeds | February 2019

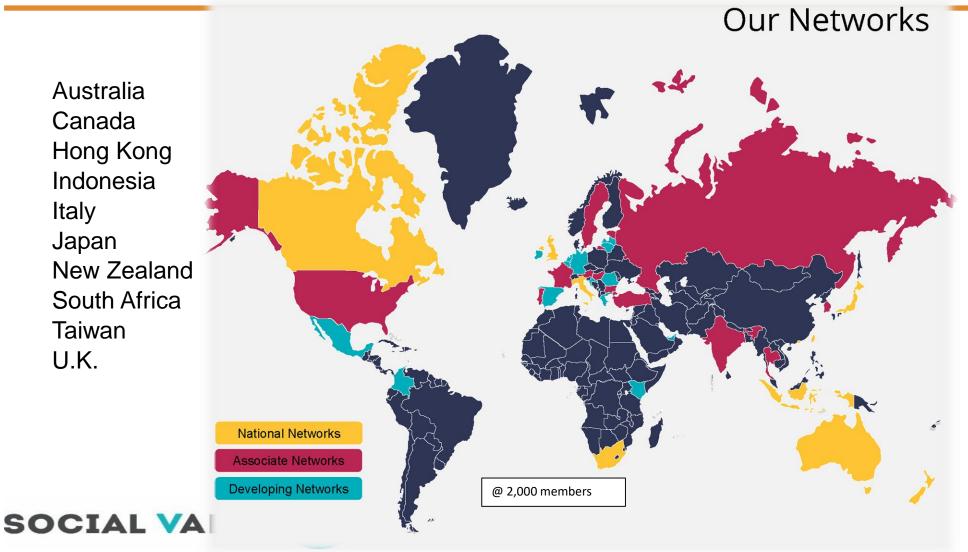




INTERNATIONAL

#### Social Value International

Australia Canada Hong Kong Indonesia Italy Japan New Zealand South Africa Taiwan U.K.



Austria Bulgaria Estonia France Hungary India Portugal Russia South Korea Thailand Turkey USA

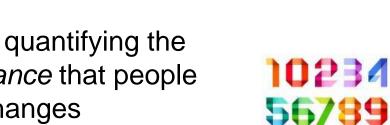
## Who are SVI? & what do we do?



SOCI

#### What is Social Value?

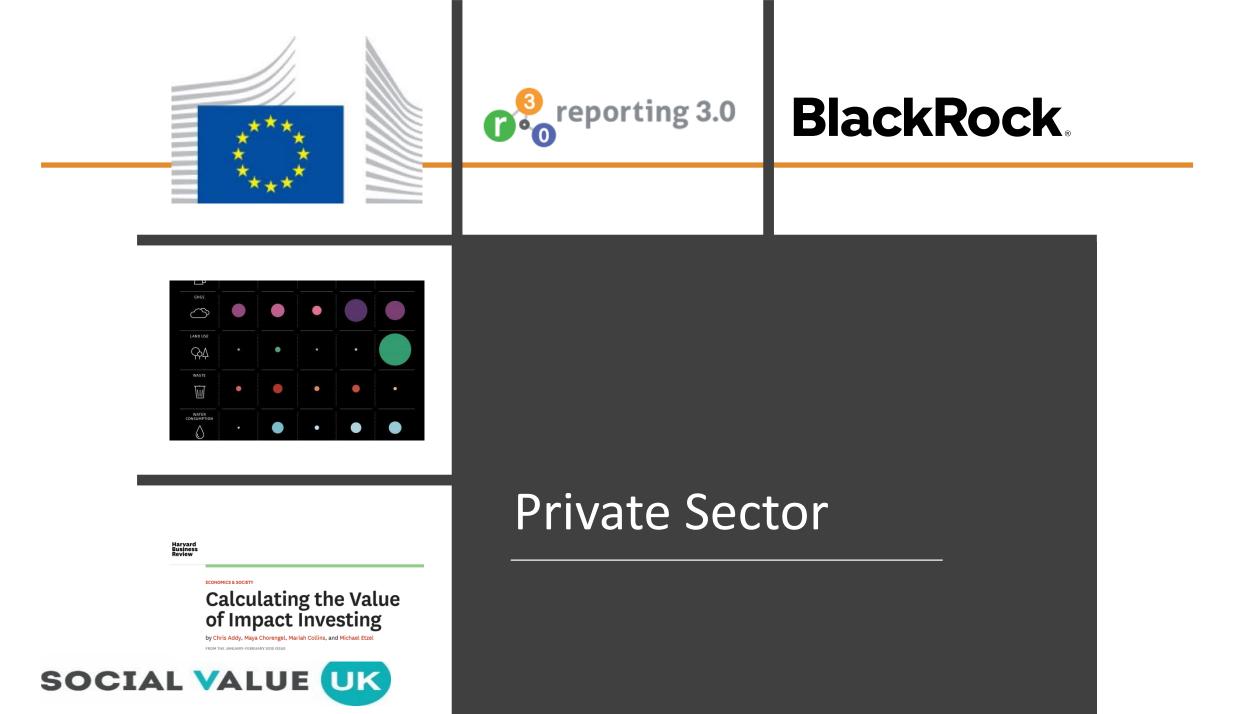
- People experience changes (outcomes) in their lives
- Some changes are more important to people than other changes
- Social Value is quantifying the *relative importance* that people place on the changes















Social and Environmental... becoming more mainstream











#### GLOBAL STANDARDS

#### **Civil Society**



**1** 

Department for Digital, Culture Media & Sport





#### **Public Sector**

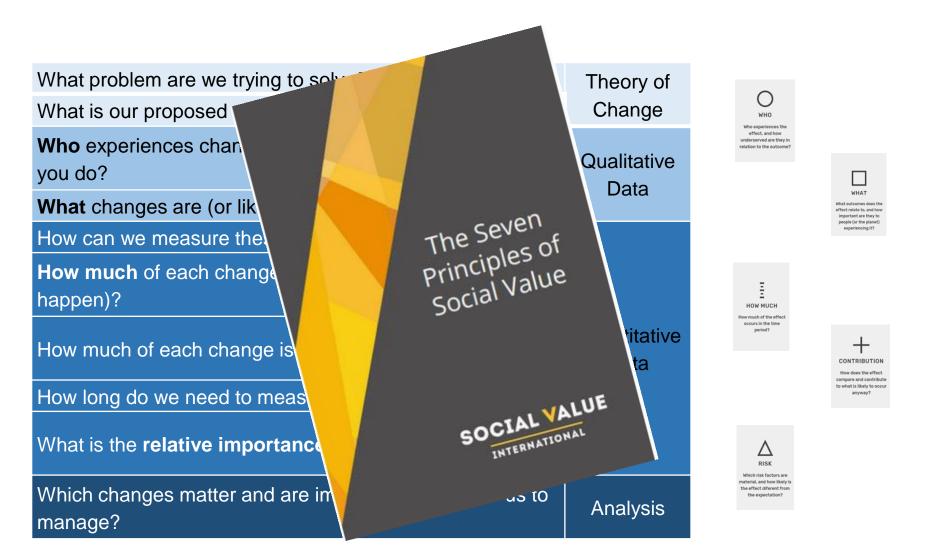
SOCIA

# Why is this important?

rising social inequality + environmental harm

## 1. Consistency (at least in theory)

#### Convergence on principles and questions



## 2. From measurement to management

#### 3. Strategic?

## 4. Are we really serious about this?

## 5. Are we measuring what matters?

6. Don't let perfection get in the way of progress!



#### Finally...

#### Shifting Power <--> Losing Control



#### Social Value: Dealing with your Board

#### Sandra Coleing, Assistant Chief Executive, Stockport Homes Jenny Osborne, Board Member, Stockport Homes







Two elements:

- A view from the Board
- The circular process from Board to service delivery

## Board member view of social value

Jenny Osborne, Board Member

#### A Board member view

- Social value is everything we do!
- Measurement needs to be:
  - Proportionate
  - Value-adding
  - Credible
- Interested in human aspects
  - Case studies
  - Outcomes
  - Cost can be useful but not main focus

# An example – inclusive growth

#### Amy Loxton, Blue Bell Emporium

Amy runs a florists business from her home called, 'Blue Bell Emporium'.

To help her set up her business she decided to join the Women in Business course, where she met many other women all in the same position.

She learnt lots of information, from business cards to marketing her business.

She said: "It was great to hear about other peoples experiences, and as I grew to know the other women, it gave me some great business opportunities and I then went on to do the flowers for one of the women's wedding."

Amy has been running her business for 7 months and has big plans for the future.





#### Heather Bridge. Two Ear Coaching

Heather joined the Women in Business course, where she decided to start her own coaching business 'Two Ear Coaching'.

The coaching services helps midlife people who are finding it hard move forward, whether that be that they have just retired or want the change career, Heather help's them through the process.

During the course, Heather learnt how to market her business and find a niche.

She said: "The course gave me the confidence to go out and give it a go, which I wouldn't have been able to do before joining. The course gives me a good overview of everything I need to know."



#### Inclusive Growth Strategy: social value outcomes

Job club

- Oct 17 to Sep 18, 225 customers into employment, 291 into accredited courses, 1,329 non-accredited training.
- 86 customers volunteered >50 hours to local projects such as Your Local Pantry.

Startpoint

- £7,000 of staff time to support computer classes in town centre
- Employed five local people on permanent contracts on living wage
- Work placements to four students

Windmill Coffee shop

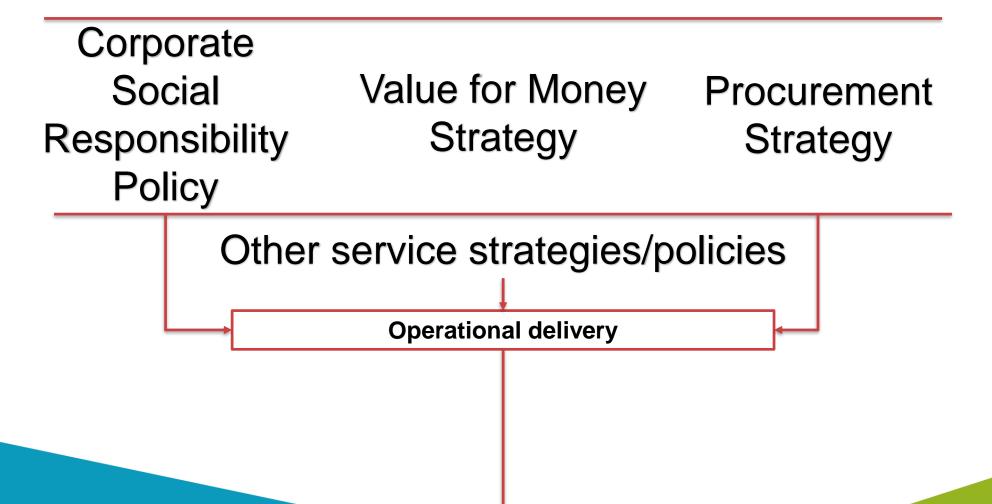
- £1,000 of discounted drinks to local community groups
- Bread and milk sourced within Stockport to support local suppliers

## From Board to operational and back again!

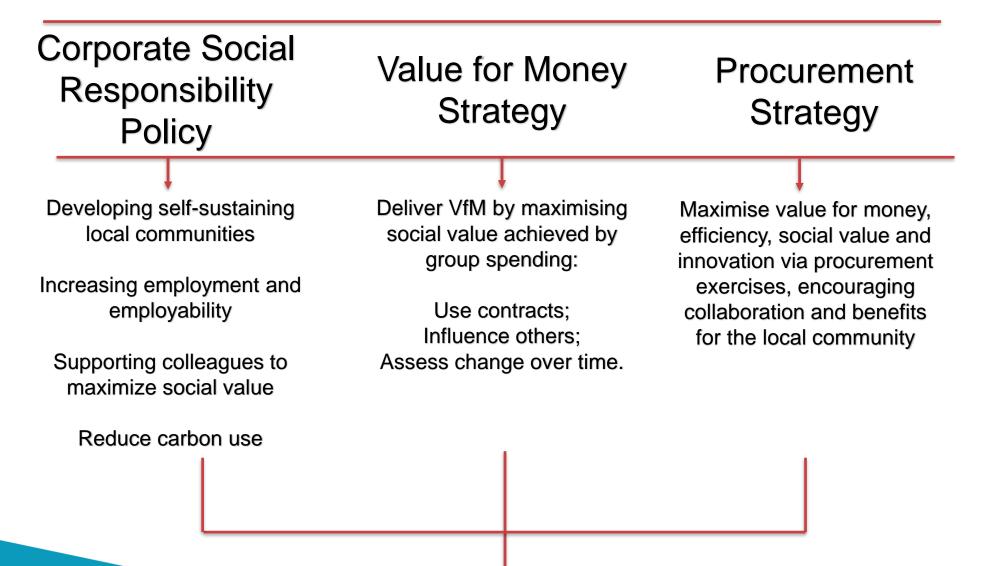
Sandra Coleing Assistant Chief Executive



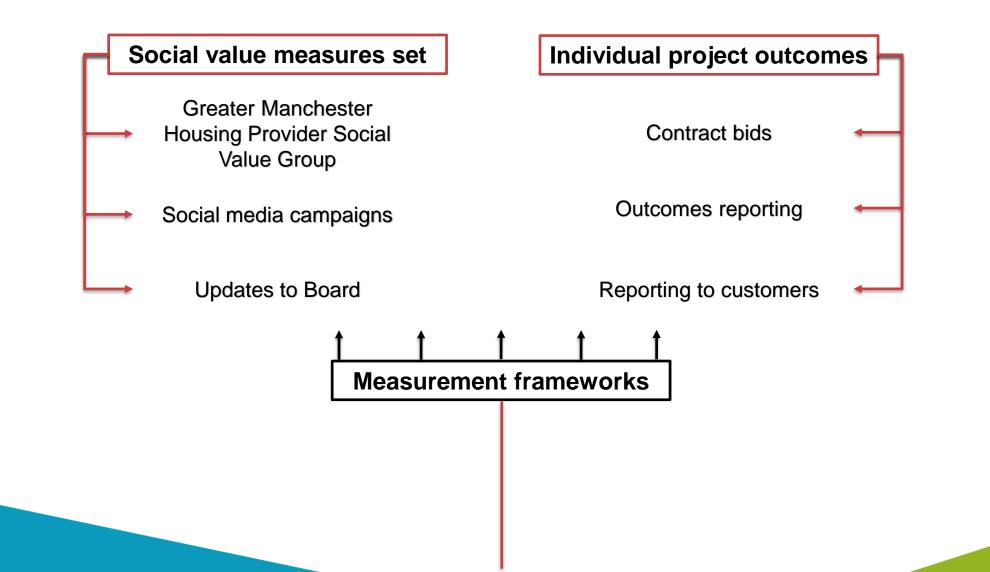
### Board

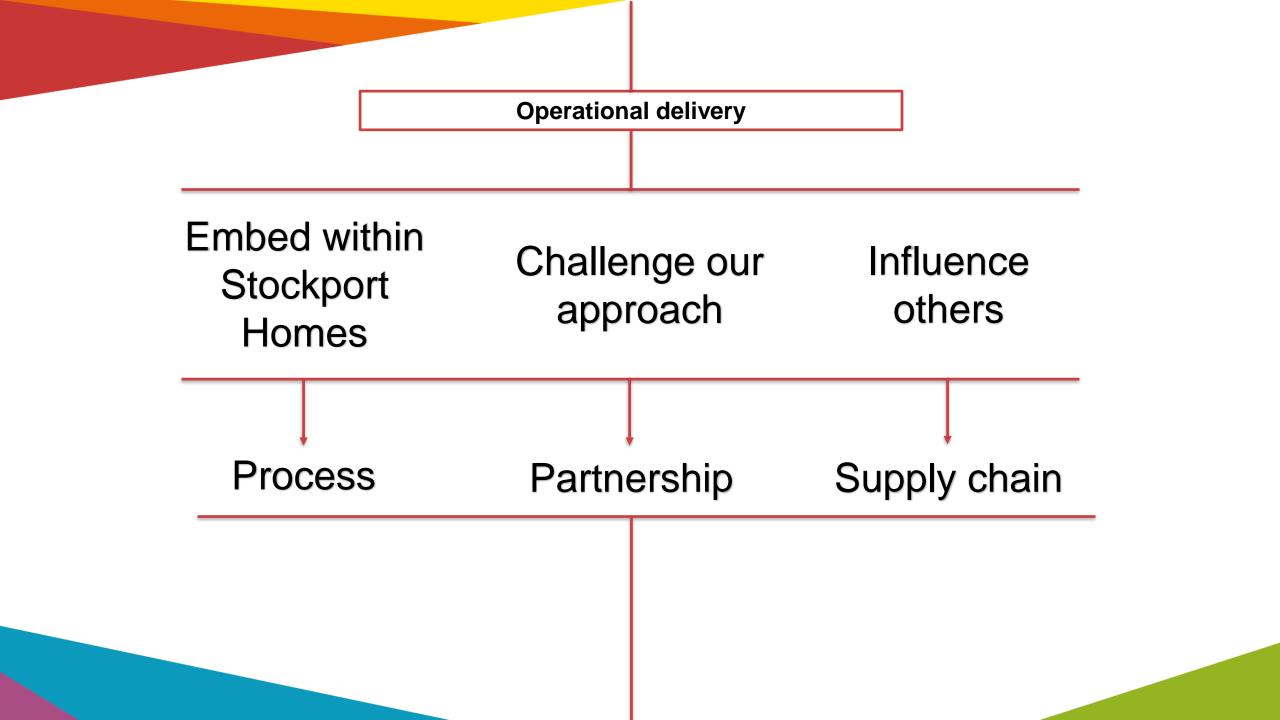


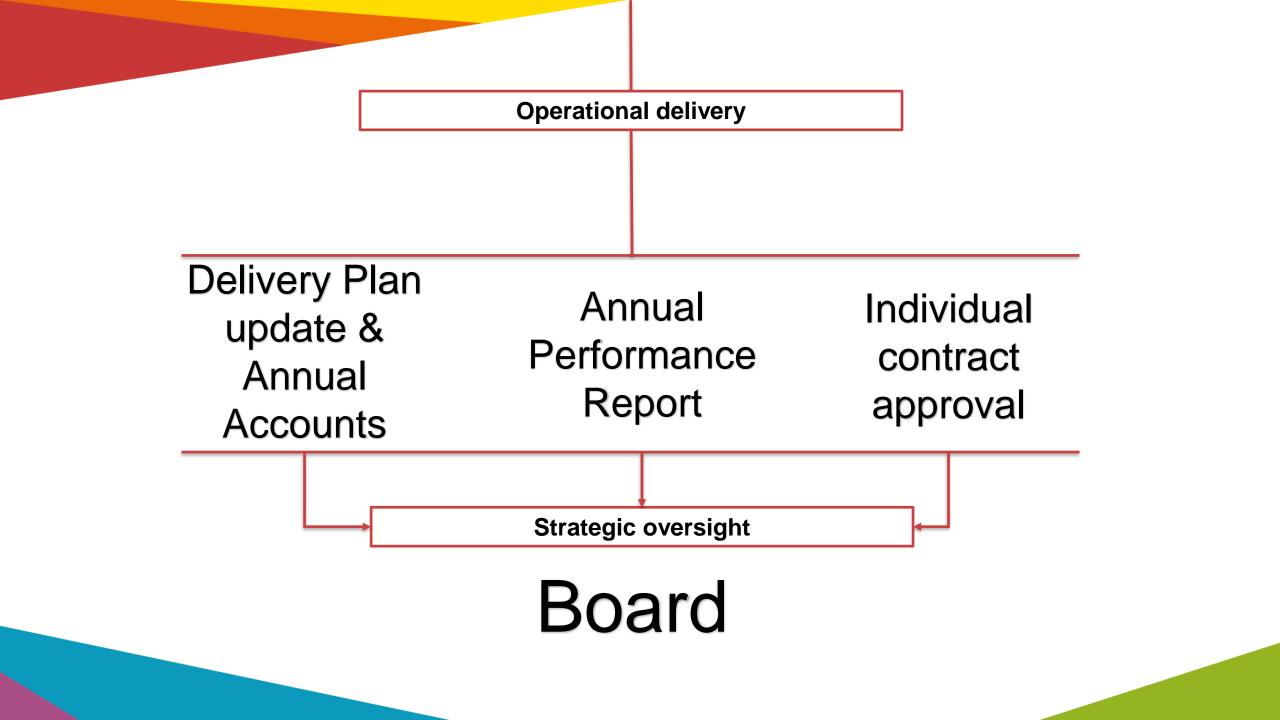
#### A social value thread



#### Measuring a social value thread







### Any questions?

Jenny Osbourne, Board Member Jenny.osbourne@tpas.org.uk

Sandra Coleing, Assistant Chief Executive Sandra.Coleing@StockportHomes.org Or Rob Lloyd, Performance and Improvement Manager Rob.Lloyd@StockportHomes.org



## Refreshments & Networking

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### One City's Response to the Perfect Storm

Jane Corbett Assistant Mayor & Mayoral Lead for Fairness and Tackling Poverty Liverpool City Council

#socialvalue2019







### One City's response to the 'perfect' storm

Cllr Jane Corbett (Labour Cllr for Everton, Assistant Mayor and Mayoral Lead for Fairness and Tackling Poverty)



At the centre of the 'perfect' storm: "If you have come to help me you are wasting your time, but if your liberation is bound up with mine then let us work together" "Nothing about us, without us, is for us" "Listen to me. You're grown ups. This is bad. You are being bad unless you do somefink about it." "Lack of power and control +unpredictability=chronic stress and anxiety" "Do one thing a day that scares you" "To be truly radical is to make hope possible rather than despair convincing" "One company acting alone can change their business, a number doing it together can change the conversation"

...at the centre of the 'perfect storm'..."A Strong and growing City built on Fairness"Priorities: (upstream and downstream):

- a) Inclusive and sustainable growth
- b) Making poverty a thing of the past

**Principles: Empowering each other,** 

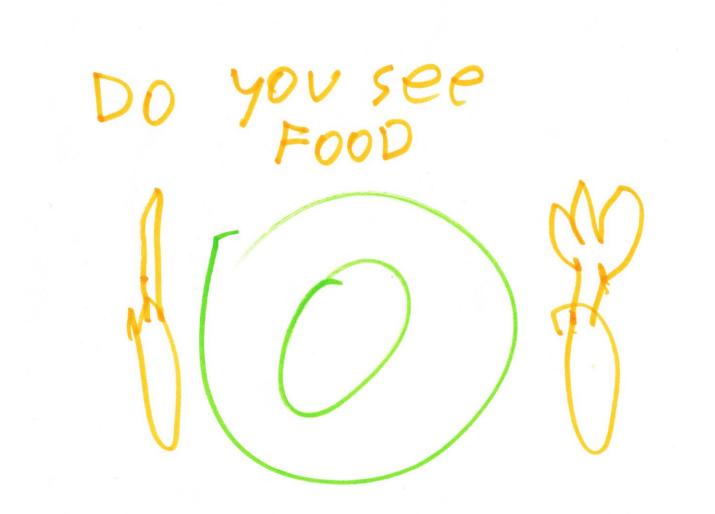
Flat structure, Collaboration so: listening and

learning from those most affected, working

with not 'at', Come2gether

Citywide Strategy Gp, Poverty Action Gp, use of the 5 x Blueprint for Better Business principles.

- Welfare Reform Cumulative Impact Analysis: the women, children, disabled, young employed, 40-59 yr olds in RSL prop worst affected
- Discretionary Housing Payment + £1.2m by LCC, demand increasing (+27.8% 16/17, +35.3% 17/18 and increasing)
- LCSS (urgent + home needs: £13m (£9.5m of our own cash), MHF £2m, Council Tax Support of least £10m (subsidised to 8.5% of CT)
- TT Foodbanks in City have now fed 108,635 different people (over a third were children) from 2014, 36% were children (top reasons: benefits changes and delays 52%, low income 26%)
- Child poverty in L'pool: 34% (32k) with two thirds from families in paid work , 33% under 5s, 31% 5-10s, 24% 11-15s, 13% 16-19s
- 2.8k in work hit by work allowance, 16k by housing allowance
- New diagnosis of stress, anxiety and depression aged 18+ increasing year on year (76% increase cf with April '14)
- 11k h/holds on Universal Credit 10k more this year, with many in work, roll out leaves more and more people on less with WTC cut, 2 child policy, eviction threat, coping with bad judgements re disability support/work capability (70% win at appeal)
- Prescription forms not changed/confusion/fines
- Article 3 of Human Rts Act: the right not to be treated in an inhuman or degrading way; access to justice undermined

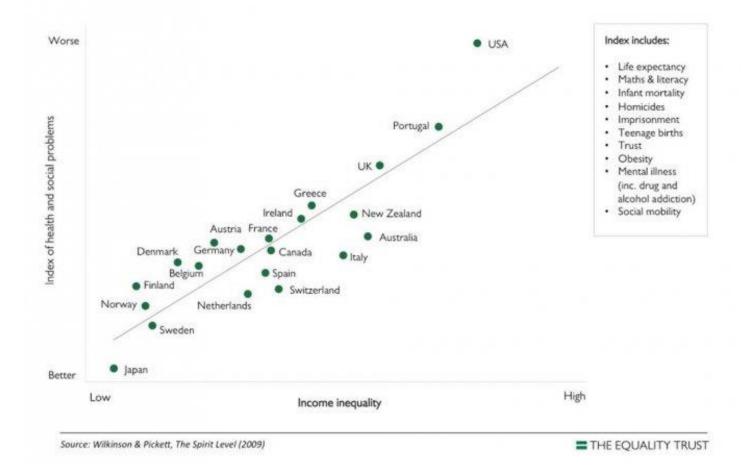


Small voices, big messages

People are having to give up their J house's because they Can not afford to Pay the money, please Stop!

Small voices, big messages

#### Health and social problems are worse in more unequal countries



- The damaging impact of income/wealth inequality (The Spirit Level by Wilkinson/Pickett)
- People tend to get judged by what they earn and what they own (and what they look like)
- Higher levels of chronic stress and anxiety across whole of society, worst impact in the most disadvantaged communities
- A greater sense of injustice, inferiority and worthlessness is felt by those on middle but especially the lowest incomes
- Trust breaks down, society divides, labels and blame are handed out
- There are higher levels of violence (often linked to feeling disrespected/dissed)
- Educational attainment is undermined and held down
- Social mobility grinds to a halt
- Consumption levels are higher (inc retail therapy) which leads to environmental damage and increased pressure on resources

#### "Fair Society, Healthy Lives" reported in 2010 in

poorest neighbourhoods people die on average 7 yrs earlier, and live 17 yrs more of their lives with a disability. Issues that affect health inc: housing, income, education, social isolation, disability, inequality and chronic stress Prof Michael Marmot's 6 main recommendations:

- **1.** Give every child the best start in life
- 2. Enable all children, ypeople and adults to maximise their capabilities and have control over their lives
- 3. Create fair employment and good work for all
- 4. Ensure a healthy standard of living for all
- 5. Create and develop sustainable places and communities
- 6. Strengthen the role of ill-health prevention

....and recognition of local Govt as the pivotal partner in addressing the social determinants of health inequalities

#### a blueprint for better business FIVE PRINCIPLES OF A PURPOSE DRIVEN BUSINESS

#### HONEST AND FAIR WITH CUSTOMERS AND SUPPLIERS

- Seeks to build lasting relationships with customers and suppliers
- Deals honestly with customers, providing good and safe products and services
- Treats suppliers fairly, pays promptly what it owes and expects its suppliers to do the same
- Openly shares its knowledge to enable customers and suppliers to make better informed choices

- Considers each person affected by its decisions as if he or she were a member of each decision-maker's own community
- Seeks and provides access to opportunities for underrepresented groups
- Makes a full and fair contribution to society by structuring its business and operations to pay promptly all taxes that are properly due

#### HAS A PURPOSE WHICH DELIVERS LONG-TERM SUSTAINABLE PERFORMANCE

#### A RESPONSIBLE AND RESPONSIVE EMPLOYER

- Operates true to a purpose
   that serves society, respects
   the dignity of people and so
   generates a fair return for
   responsible investors
- Enables and welcomes public scrutiny of the alignment between stated purpose and actual performance

#### A GUARDIAN FOR FUTURE GENERATIONS

A GOOD CITIZEN

- \* Treats everyone with dignity and provides fair pay for all
- Enables and welcomes constructive dialogue about its behaviour in keeping true to its purpose
- Fosters innovation, leadership and personal accountability
- Protects and nurtures all who work for it to ensure people also learn, contribute and thrive

- Honours its duty to protect the natural world and conserve finite resources
- Contributes knowledge and experience to promote better regulation for the benefit of society as a whole rather than protecting self interest
- Invests in developing skills, knowledge and understanding in wider society to encourage informed citizenship





verpool ity Council

"One company acting alone can change their business, a number doing it together can change the conversation"

Barack Obama asked by a group of potential young leaders what was the most important quality in a leader, replied:

"To be predisposed to see the power in other people"



The Policy Framework...



### **Engaging Tenants in Social Value Discussions**

Jenny Osbourne Chief Executive tpas

#socialvalue2019







# Engaging tenants in social value discussions

Jenny Osbourne, MBE Chief Executive



# who are we?



We're Tpas, England's leading engagement experts. Our membership is made up of local tenants and landlord organisations, covering 2.2 million homes.

**Tpas: Creating conversations that matter.** 

TENAN

### What we do



We bring tenants and landlords together.

Because together we can find solutions to improve services, save money and bring lasting change to communities.







### Research – An investment not a cost

as

*'investing in tenant involvement can produce financial, service, social and community benefits'* 

but organisations are not very good at tracking and evaluating these benefits

### Investing in Involvement

**tpas** 

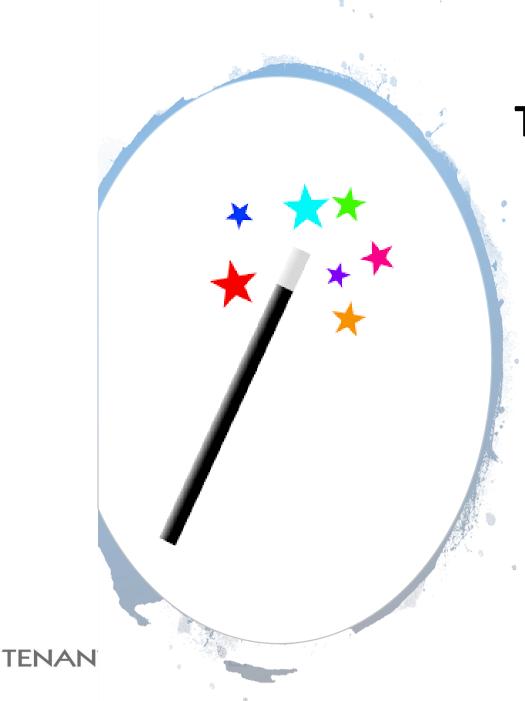
The benefits of involvement the report suggests looking at are

- Cost savings
- Tenant satisfaction
- Service improvements
- Social dividend and community benefits
- Individual benefits
- Benefits to employees

Community Gateway







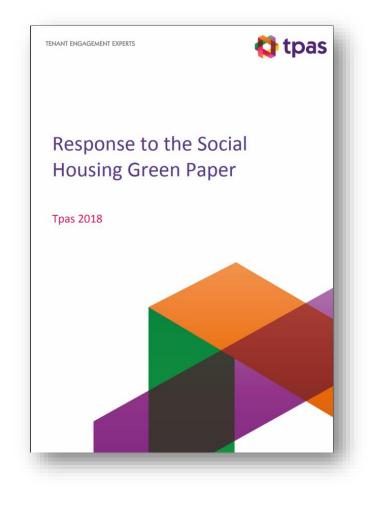
# There is no magic wand

 Organisations find their own way to measure impact and record value as

- Some focus on monetary values
- Some adopt a story

have to decide, together, what fits you – bit like Involvement Models

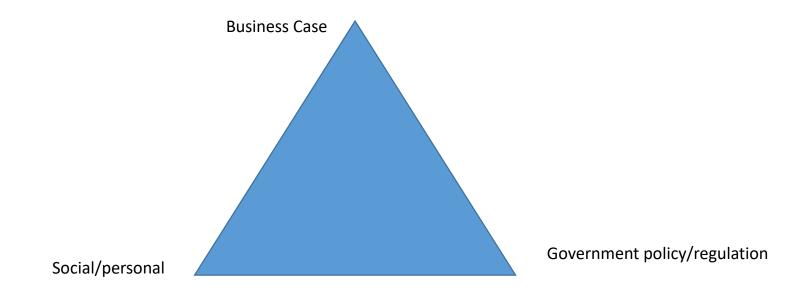








### The case for Engagement



Social value.....



...we wiped the slate clean and started again?

- Why (are we here)
- What (are we trying to do)
- How (can we do it)
- How (are we going to evidence we are doing it)



7 Steps to Show the Value of your Engagement

#### Link to your business plan

- Your tenant involvement and community development work needs clear links to your organisational vision, values and business plan
- If you can't make the link should you be doing it?

### Define the difference you want to make

- Think about outcomes from the start
- Define what the involvement or project is going to influence, change or create
- Do this with the relevant stakeholders



Determine the value you will create

- There's lots of potential for creating value

   cost savings, satisfaction, self confidence, take up of services, to name a few
- Contractors can help too, consider the Public Services (Social Value) Act (2012)

#### Agree measures

- Decide what needs to be measured and when
- Don't forget to evidence the start point so you can measure the change
- Consider what stakeholders want you to measure too



show the value of your Engagement

7 steps to





- Choose the most effective methods of involvement for the task
- Who needs to be involved? Consider diversity

#### **Deliver the involvement**

- Brilliant involvement needs to be well planned, with access to information, training and support
- Be flexible; if the original plan is not going to deliver outcomes for tenants, communities or your organisation try something different



### 7 steps to show the value of your Engagement





#### Gather the information

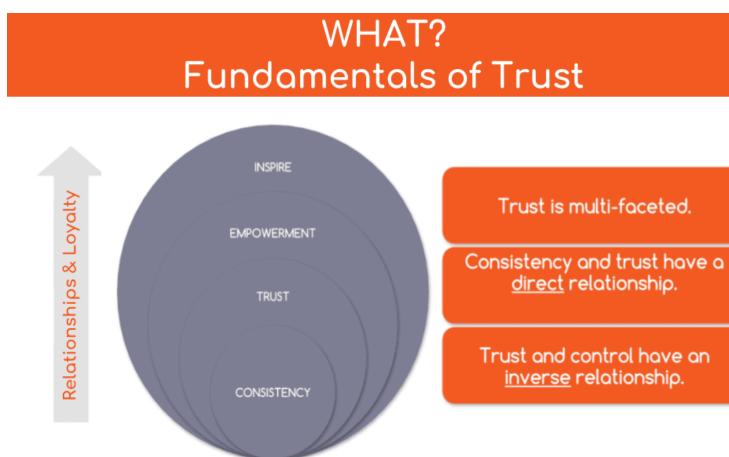
- Keep track of resources, activities, what you produce and what's changed
- Gather what you planned to gather but look out for other positive knock on effects too

#### Assess the impact

- Identify what's changed and how much of this change you created
- Don't over claim, be realistic about what would have happened anyway



### Engagement today





### Role of Tenants

- From the start
- Ideas valued and tried out
- Involved in measuring
- Focus on the language we are using
- Tap into their networks and knowledge
- Encourage them to be advocates
- Will push for more



### Role of Contractors



# **tpas**

### Role of social media



### Stories vs the numbers













# Engaging tenants in social value discussions

Jenny Osbourne, MBE Chief Executive





## Chaired by Andrew Van Doorn, HACT

Ben Carpenter, Social Value UK Sandra Coleing, Stockport Homes Jenny Osbourne, tpas Jane Corbett, Liverpool City Council



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# Lunch & Networking

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## Workshop 1: Social Value in Practice...



**Wool Room: Social Value Masterclass** 

HACT Staff

#### Tweed Suite (This Room): Demystifying Social Value in procurement: Launch of the Social Value Credit Model

Matthew Baxter, Echelon

**Corduroy Room:** Social Value Exchange: An online marketplace where resources are channelled into solving local problems

Dan Ebanks, Firesouls







# Social Value Conference



Demystifying Social Value in Procurement: Launch of the Social Value Credit Model 6th February 2019



## Contents

- Introduction to echelon
- Delivering Social Value Process
- Does it Work?
- The Future Social Value Credit Model?



## Introduction to echelon

- Established for 14 Years
- Procured in excess of £6bn of asset management related contracts
- Focus on collaborative contracts
- Co-authors of HACT Social Value in Procurement Toolkit
- Facilitators of AMIP/CAMIP best practice groups
- Award winning Social Value offers (Basildon)
- Own and manage Pretium Frameworks
- Working across sector to drive Social Value

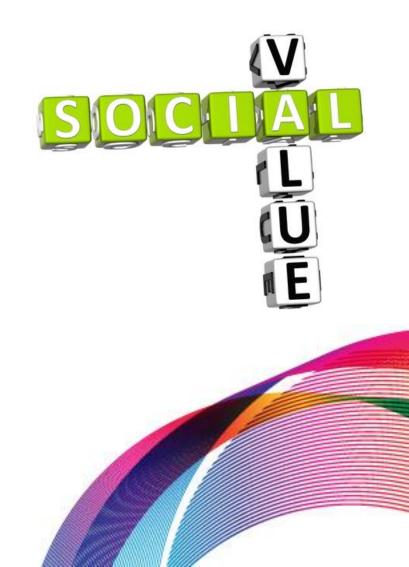






# **Delivering Social Value - Process**

- Stage 1 Understand needs
- Stage 2 Market engagement
- Stage 3 Scope requirements
- Stage 4 Develop document(s)
- Stage 5 Procure model
- Stage 6 Mobilise model
- Stage 7 Contract delivery



# Stage 1 – Understand Needs

- Ensure demographic information captured
- Use tools such as Community Insight
- Engagement with local agencies
- Resident engagement what are their drivers?
- What are other doing? exemplars
- Site visits and market research

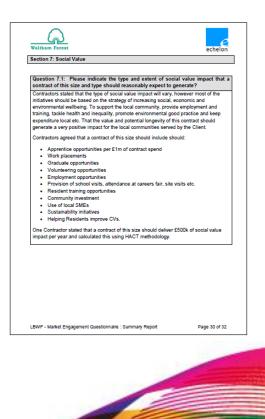






## Stage 2 – Market Engagement

- Early engagement with potential providers
- Encouraged in PCR 2015 Regulations (Regulation 40)
- Contextualise if possible
- Ask for specific views/ideas
- Will provide sense check and also draw on best practice
- Recent examples include LBWF and SADC



echelor



# Stage 3 – Scope Requirements

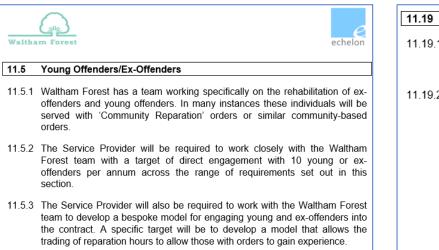
- Engage with internal and external stakeholders
- Use of workshops
- Identify Social Value opportunities
- Link to objectives
- Rank to ascertain value and viability
- Quantify wherever possible
- Hanover identified 21 Objectives

No.	Social Value Objective	Dots	Hanover Objectives				
			Connect	Be	Take	Keep	Give
				Active	Notice	Learning	
1	Local prioritisation of what is needed on	5					
	Estate. Could link to a 1% levy that is						
	then developed with Residents to deliver additional SV fund ring-fenced						
	for spend on that Estate.						
	For example, a £250k kitchen contract						
	would generate a levy of £25k that						
	could be spent on the estate on wider						
	SV improvements with input of						
	Residents - if not spent would be						
	pooled.						
2	Provision of pad/tablet to Resident.	4					
	Principle that Contractor provides a						
	low-cost pad that is gifted to the Tenant						
	to enable planned works						
	communications but then opens out wider to Hanover digital inclusion (e.g.						
	could also be loaded with						
	Hanover/Repairs aps etc.)						
3	Employment Opportunities - ensure	4					
	offer employment to Tenants and their						
	families and consider employment and						
	training of local Tenants to undertake						
4	Handyperson schemes. "Dementia Friends" – all contractors	4					
4	and sub-contractors to become	4					
	dementia friends (i.e. have certified						
	awareness training) -						
	www.dementiafriends.org.uk						

hanover

## Stage 4 – Develop Documents

- Clear set of requirements set out in Term Brief/Specification
- Ensure method statement section on delivery
- Quantify who will be responsible for delivering Social Value
- Specific requirement for Social Value Manager?



#### 11.19 Scrutiny from Young People

- 11.19.1 A clear message that resonated during the scoping for the Social Value offer was the lack of scrutiny (and ultimately engagement) from younger people within the Borough.
- 11.19.2 The Service provider will be required to work with the Council in the development of a 'LBWF Young People's Scrutiny Panel'. The level of support will include (but not be limited to the following):
  - Using contract resources to identify potential interested parties
  - · Mentoring and support to panel members
  - Development of a bespoke half-day induction for scrutiny panel members to provide overview of contract and social value delivery model
  - Provision of office space for meetings of group
  - Administrative support of group (i.e. provision of laptop and support minute taking).







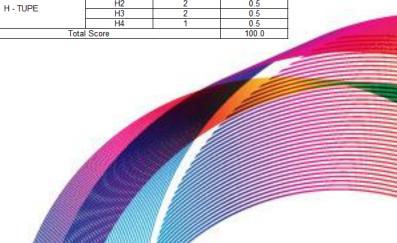
## Stage 5 – Procure Model

- Use of CD/CPN allows honing of model
- Ensure adequate weighting on section
- Encourage innovative ideas
- Ensure offer is deliverable test & challenge
- Recent example phone calls!

Proposal Area	Question Number	Page Limit	Marks Available		
	A1	10	7.0		
	A2	5	7.0		
Ī	A3	5	7.0		
Ī	A4	2 x A3	4.0		
A - Project Delivery	A5	1	3.0		
	A6	2	3.0		
	A7	2	3.0		
Ī	A8	1	3.0		
Ī	A9	2	3.0		
B - Resident Care	B1	3	5.0		
D - Resident Care	B2	1	2.0		
	C1	3	5.0		
C - ICT	C2	1	5.0		
Ī	C3	1	5.0		
	D1	5	7.0		
D - Social Value	D2	3	4.0		
D - Social Value	D3	3	2.0		
	D4	1	2.0		
E. Deferment Mercenet and	E1	N/A	Pass/Fail		
E - Performance Management and - KPIs	E2	1	2.0		
KPIS	E3	1	2.0		
	F1	1	1.5		
E Usellik and Osfeks	F2	1	1.5		
F - Health and Safety	F4	1 x A3	2.0		
	F5	1	2.0		
	G1	3	4.0		
G - Cost Control	G2	2	3.0		
	G3	2	3.0		
	H1	2	0.5		
H - TUPE	H2	2	0.5		
n-IUPE	H3	2	0.5		
	H4	1	0.5		
Total	Total Score				

johnnie**johnso** 

EQUITY







## Stage 6 – Mobilise Contract

- Lock down Social Value offer
- Development of 'Promises Document'
- Social Value mobilisation sub-group
- Clear implementation plan

Ref	Priority	Page	CAT	Requirement	the partnership. Please give the date where possible of when the	be put into	Name of person responsible	Date signed off by Wates	Date signed off by BHP
-	_	<b>v</b>	,T	v	requirement was implemented 👻	place -	-		
CL5	3	3	ET	Dedicated CSR Manager (locally recruited)					
				- Focused accountability on lasting					
				community legacies					
CL10	1	4	ΕT	Resident Engagement One coordinated					
				engagement strategy operated from					
				dedicated Community Hubs (located in					
				local shopping areas)					
CL27	2	7	ET	Resident Training Course Places - 90					
CL29	3	7	ET	School Engagement All 98 schools					
CL30	3	7	ET	Annual Careers Fair in partnership with LB Brent					
CL31	3	7	ET	Sustainability Training for Brent Residents					
CL32	3	7	ET	My Home Finance - Access to affordable					
				finance for Brent residents					
CL33	3	7	ET	Reading Challenge Scheme - Improving					
				educational attainment of students					
CL34	2	8		Community Day Project					
CL35	1	8	ΕT	Shop front/Offices/shared community					
	-			spaces					
CL40		8	ET	Annual Careers Fair					
CL42	3	9	ET	Business Class principles Improve school performance and educational attainment					
CL43	3	9	ET	Reading with Children Improving					
UL43	5	9		educational attainment and providing					
				positive role models					
	1			positive role models					



# Stage 7 – Contract Delivery

- Scrutinise delivery
- Use of bespoke Social Value KPIs

6	Social Value	$rac{Number of Social Value Targets met}{Number of Social Value Targets}  imes 100$	2, which have been met or exceeded by the Service Provider at the end of the period being measured	At the end of the period being measured the Service Provider has met 4 Social Value Targets, they have exceeded a further 2. There are a total of 7 Social Value Targets. Performance=(4+2)/7 x 100=85.71%	Annually	80.00%	90.00%
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- Measure value that Social Value is delivering
- Allow organic growth of Social Value
- Annualise review, lessons learned and reset





# Does it Work?



## **Social Value Commitments**

- BasWorx
- Apprenticeships
- Skills Training
- Employment Opportunities
- Engaging with Schools
- Supporting Unemployed Residents
- Resident Training
- Supply Chain

MORGAN SINDALL PROPERTY SERVICES



#### PROCAT PROSPECTS COLLEGE OF ADVANCED TECHNOLOGY

















## **Social Value**



#### Achievements July 2016 – June 2018

• BasWorx

- Apprentices
- Skills Training
- Employment Opportunities

- 4 intakes of BasWorx programme of local residents have been completed
- 29 candidates trained
- 8 apprentices, and a qualified supervisor make up the BasWorx team
- 24 apprentices
- 36 work experience placements
- 94% of the workforce residing within a 15 mile radius of the Barleylands office
- 15 employment opportunities provided to candidates who were previously unemployed



## **Social Value**



- Unemployed Residents 122 Job club appointments
  - 4 job clubs in partnership with JCP; Vange, Pitsea, Lee Chapel North and Basildon

#### Schools

- **4** partnerships with secondary schools: The Billericay School, Beauchamp's School, De La Salle School, Woodlands School
- 2 primary schools: Maple Grove School (Pitsea), Lee Chapel School (Lee Chapel)
- 4 STEM Ambassadors trained
- 33 Students mentored
- 31 school and college events attended including mock interview and careers events





A Basildon based Social Enterprise delivering cyclical decoration works to Basildon Council properties as a subcontractor to Morgan Sindall Property Services

Creating work experience, apprenticeship, and employment opportunities for Basildon residents through a structured work based training and upskilling programme

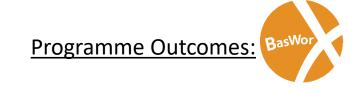
The focus is on bridging the gap between leaving school and progressing onto an apprenticeship, and supporting unemployed residents into work.

The BasWorx work to learn programme consists of two routes. The traineeship route and the work academy route





## **BasWorx**



- Level 1 Qualification in Construction
- Level 1 H&S in a Construction Environment
- CSCS Test
- Painting and Decorating training
- Employability skills
- 6-8 weeks work experience to boost CV
- Guaranteed Interview scheme
- Maths and English support (traineeship route only)



**Borough Benefits** 



- Leave a sustainable legacy
- Upskilling residents through training
- Creating employment opportunities
- Promoting opportunities available in the construction industry



## **BasWorx** | Cohorts



Cohort 1 | Traineeship

October 2016 – January 2017









**Cohort 2** | Work Academy April – June 2017 Chris, Ross, Trevor, Jamie, Derrick, Paul

Cohort 3 | Traineeship July – September 2017 Harry, Luke, Jack, Billy, Damien, Michael

## BasWorx | Cohorts

#### **Cohort 4** | Traineeship April 2018 – May 2018 Megan, Georgie, Kieran, Aron, Billy, Frankie







## **BasWorx** | traineeship

16-24 year olds

# BasWor

#### Mitchell



Cohort 1, joined us in January 2017.

Mitchell is 18 years old and lives in Laindon. Recently improved his functional skills maths and English to a L1 and is working toward the painting and decorating L2 apprenticeship.

#### **Michael**



Cohort 2, joined us in October 2017

Michael is 19 and lives in Basildon. He has always enjoyed construction at school and wanted the opportunity to get hands on skills. He is now working toward the L2 bricklaying apprenticeship

#### Harry



Cohort 2, joined us in October 2017

Harry is 22 and lives in Basildon. He is a conscientious hard worker, he is enthusiastic and is keen to learn the trade, he will start the painting and decorating L2 apprenticeship next month



## BasWorx | Work Academy

19+ year olds



Chris, 46

Chris has been a Basildon resident since he was 26. Worked as a Warehouse Manager for over 20 years, but was unfortunately made redundant in August 2016. This is the first time he has found himself unemployed and he was job hunting for 9 months before BasWorx. He had applied for 353 jobs with only one of these progressing to interview stage.

Chris has a family including a partner and 4 children to support between the ages of 4 and 13.

Its good to find a training course like this which provides genuine opportunities for people and builds confidence

**Paul**, 33



I've really enjoyed the comradery, the programme has brought people together from different aspects of life

Trevor, 52

Derrick, 54

BasWor







**MORGAN** 

## Ideas for the Future....

- Idea 1: Developing a local offer
- Idea 2: Social Value credits
- Idea 3: Annual Social Value Review and Accreditation
- Idea 4: Social Value Benchmarking







# 1. Local Offer

- Focus on importance of SV item to client
- Understanding demographic
- Using weighting factors guidance note?
- Different level of importance (e.g. young offenders at LBWF, Ex-Service personnel at JJ)
- Developed through workshops







# 2. Social Value Credits

*e*chelon

- Conversion of Social Value Offer to a value out of 100
- Each element given a 'nominal' credit
- Discuss at tender or award stage?
- Allows "trading" of credits
- Build a databank of Credit values but weighted by Client
- Allow blending of SV offers where multiple Service Providers
- Will build flexibility
- Protect from potential challenge





# 2. Example

Item	Measurement	Offer	Weighting	Unit Credit Value
Apprentices	Apps/Per £1m	8 Apprentices	30	3.75
Engaging Young Offenders	No. Engaged	10 Per Annum	20	2.00
Dementia Awareness	No. Operative Trained	35 Operatives	20	0.58
Digital Inclusion	No. Workshops	10 Workshops	10	1.00
School Engagement	No. Schools	6 Schools	10	1.67
Volunteering	No. Days	70 Days	10	0.14
			100	





# 3. Annual Social Value Review & Accreditation echelon

- Use same logic as annual OBR
- Output measures against targets
- Review any trade-outs and impact
- Review value added
- Undertake lessons learned workshop
- Flexibility to reset using Credit process
- External Accreditation by HACT/echelon?





# 4. Social Value Benchmarking

- Opportunity to Benchmark with others
- Understanding of credit values for different organisations
- Output measures (e.g. percentage of offer delivered)
- Value Add measures comparison with others on value add
- Sit within AMIP/CAMIP?
- Bespoke scorecard supported by HACT/echelon?







### Questions & Contact

Mathew Baxter – Managing Director mathew@echelonconsultancy.co.uk 07989 325887



## Workshop 2: Social Value in Practice...



#### **Tweed Suite (This Room):** Social Value in Practice: The Experience of Leeds City Council

Jackie Fox, Leeds City Council

#### **Wool Room:** Five Years of Using the UK Social Value Bank

Elaine Sams, forviva

**Corduroy Room:** How Procurement and Communities Teams Work Together to Tackle Social Issues: an interactive game

Barry Malki and Adam Chester, HACT





## Social value in practice: The experience of Leeds City Council

## Jackie Fox and Frank Perrins



# Leeds

Leeds vision to be the Best City in the UK

- A strong economy and a compassionate city
- Modern, vibrant, growing city

#### We need Inclusive Growth

- 16 of the most deprived neighbourhoods in the UK
- Partnership working

#### **Housing Leeds**

- 56,000 properties including 116 high rise
- Within these 80,000 tenants







# **Experience of using SVB**

Value of partnership working in a priority neighbourhood

Value to tenants of money advice from Leeds Credit Union

Value of investment strategy options – eg removal of garages

Value of Enhanced Income Team working with tenants on financial inclusion

## How we have used it – our role

#### 2 different approaches

- Team working with tenants
- Partnership working across a neighbourhood

#### Both

- Want to evidence value
- Presentation and discussion to team / partnership of SVB
- Looked at how best to capture any changes they hope to achieve
- Prepared measurement tools, for example A and B surveys
- At year end, analysis and Impact Valuation Statement

Guestion 5 Do you have regular access to the intermet Ves No Guestion 5 How well would you say you yourself are m Tennant Survey Enhanced Income Project - Initial Survey		ncially thes	
Ennanced income Project - Initial Survey			
Name:			ents?
Postcode: Telephone:			
Email:			ngly gree
Please answer the following questions to tell us about your current situation:			
Question 1         How would you describe the composition of your household?           Piese oross (X) one box only.         One adult aged 60 or over           One adult under 60         One adult aged 60 or over           Two adults both under 60         Two adults, at least one 60 or over			ngiy gree
In dealais Bound with childchildren     I parent Samily with childchildren     at least one under 16     Three or more adults, 16 or over     Other			ngly gree
Question 2 Are you or your partner currently in employment? Please cross (*) one box only.	You	Your Partner	ay that
No			.booL
Full time employment			on?
Self employment			oni
Part time employment			
Question 3 Are you or your partner currently volunteering or in training? Please cross (X) as many as apply. Your Partner			
No			ey
Apprenticeship			
Vocational training (specific course eg GNVQs, HNC, BEC)			
Regular volunteering (at least once a month for at least 2 months)			
General training for a job (to increase skills, help find new job)			
Employment training at a Job Centre			
Please tum over			

### How we have used it - the teams

#### **Enhanced Income Team – Service level**

- Interview opener: "It works really well as an ice breaker"
- Identifies and tailors actions: "Helps identify underlying issues early on and streamline the visit"
- Reference point: "I find it useful as you can refer back to it, for example, 'you mentioned you had some debts, can you tell me what these are'"



## How we have used it - the teams

#### **Partnership working – Neighbourhood level**

- Piloting a range of measures
  - Housing Leeds actions district heating, removal of litter
  - Changes for tenants and residents captured through A and B surveys
- Door knocking sample survey
  - Engaging with the community: "It has been invaluable in terms of physically getting into nearly every block and talking to a broad range of people."
  - Finding out what the local issues are: "You can't beat actually talking to people in their own homes to get a deeper understanding of the issues."

### Challenges faced – our role

Partnerships / teams need to 'smell the coffee'

Is it just an added extra?

Will it make a difference understanding the social value they create?



Is it just an internal measurement tool?



## **Challenges faced – the teams**

- Door knocking is resource intensive! "Although it was intense in the amount of time it took to carry out 99 surveys, it was worth it due to the team effort – more resources make the job easier."
- For some the surveys are too onerous: "I have found them time consuming. I understand why they have to be done but given everything you go through at an interview..."
- Collecting closing surveys: "I find once you have people in a more comfortable and sustainable lifestyle, it becomes more difficult to engage, perhaps because tenants have no 'gain' from completing a closing survey."

### What we have learnt – our role

- Beneficial for a new service
- Highest social values link to the aim of the team
  - Three key areas where the Enhanced Income Team was having an impact on the wellbeing of tenants – financial comfort, relief from being heavily burdened with debt, and improvements in overall health
- Seen as more 'contemporary' than a satisfaction survey, and quicker to demonstrate outcomes
- Senior management liked clear evidence
- May just be seen as an internal measurement tool

## What we have learnt – the teams

#### **Enhanced Income Team – Service level**

- Overall social impact more than £3.7m in 2017/18
- Motivates the team

"They were very pleased to receive such a concise report... They felt part of something new and understood the reasons why we do the surveys a lot more. They really did feel like they were making a difference."

- Team increased
- Debt and mental health identified as the more obvious barriers to paying rent
- The process itself could be beneficial

### What we have learnt – the teams

#### **Partnership working – Neighbourhood level**

- The process has aided engagement:
- "The survey gave us an opportunity to talk to people in their homes about their lives."
- Helped with decision making:

"When thinking about positive interventions, it's easier when you have a real person in mind as a reference point when you are planning stuff."

"Being able to marry together some of the desk-based stats research with conversations with real people has proved essential."

#### Any questions ?



#### **Questions for the workshop**

- Are these approaches similar to your experiences?
- Anyone carried out measurement at neighbourhood level using a range of indicators?
- Anyone used a sample for measurement? Or measured interventions over a number of years?
- How have you used your findings externally?



### **Social Value: Supporting a People Centred Strategy**

Sinead Butters Chief Executive, Aspire & Chair, Placeshapers

#socialvalue2019





# Social Value Supporting a people centred strategy

Sinéad Butters Chair, PlaceShapers & Chief Executive, Aspire

PlaceShapers Building Homes and Lives

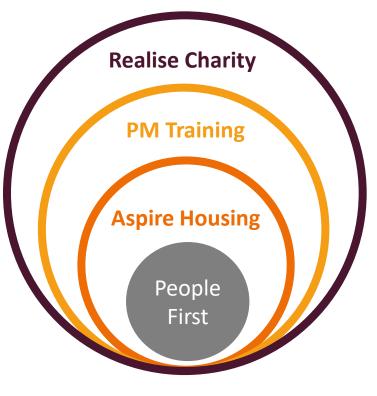
Social Value Conference 6 Feb 2019



# **Aspire Housing**

- Aspire **£50m** Turnover
- Employing 420 staff
- Based in North Staffordshire
- We Build, We Train, We Support





**Building Better Futures** 

## **PlaceShapers**

- Tenants at our heart
- Deep in communities
- Building much needed homes
- Diverse activities

realise

pm

aspire

### Values led approach!







## **Sector Challenges**

- Political uncertainty / fragility
- Tories support May be transitory
- Labour want us to reprise our social purpose
- Tension between Sale and Social
- Market uncertainty
- Tenant focus

### **Regulation is Changing!**







### Social Value, <u>So What</u>?

# "Within the midst of all this, how do we navigate our way through?"

By having: a crystal clear vision, outstanding leadership, a model that palpably works, a culture of social purpose and impact, clarity on the value we can bring & evidential social impact





# Social Value, <u>What next</u>?

- Easy to criticise
- So many measures but supports our strategies
- Evidences our impact
- Ensures we can remain impactful
- Gives us validation to act

Can we afford not to?







# **Thank You & Questions**





### **Chair's Closing Remarks**

### Andrew van Doorn Chief Executive HACT

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Thank you for attending

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