

Creating Social Value Policy



Policy date	Policy Owner	New or review
2016- 2021	Danielle Price	Policy review

Internal/ Customer Facing	<p><i>Customer facing policy. Consultation Dec 15- March 16, including:</i></p> <ul style="list-style-type: none"> • Staff consultation (V1)- Nov/ Dec 15; • STMT (V2)- 18.01.15 • Legal advice from Anthony Collins Solicitors (V3) Feb 15; • Union consultation (V3) 09.02.15; • Resident consultation (V3)- 16.02.16 • Board Consultation (V4)- 01.03.16 	Version no	FINAL VERSION
Risk assessment	<ul style="list-style-type: none"> • The Social value audit identified a number of actions, which if not implemented, were deemed to pose a low to medium risk. These recommendations include the review and embedding of this policy, a review of current processes to ensure that social value is included in all applicable procured contracts and within current work carried out directly by Bolton at Home. • This policy addresses one of the recommendations in the audit, and an implementation plan, including a communication plan, has been drafted and agreed. We will circulate this policy to all stakeholders, and will advise all teams across Bolton at Home, that the Partnerships Team are available to attend Team meetings for policy briefing sessions, to aid implementation. A number of process improvement sessions, which have already taken place, will inform the procedure development, which will follow the approval and publication of this policy. In addition we have carried out a risk assessment, to understand and mitigate the risk of legal challenge. The risk assessment, created a score of 9, and we have implemented mitigating actions. 		
Approved by	<ul style="list-style-type: none"> • STMT (V2) • Union (V3) • Residents (Customer Committee) (V3) • Board (V4) 	Date approved	18.01.15 09.02.15 16.02.16 01.03.16
Review Date	2020	Date of Equality Analysis	To carry out following consultation

Contents

1. Introduction	page. 3
2. Policy statement	page. 4-5
3. Vision, aims & objectives	page. 6-7
4. Financial implications	page. 8
5. Ownership & accountability	page. 9
6. What we will deliver directly	page. 10-12
7. Working with our contractors & suppliers	page. 12-16
8. Working with our partners	page. 17-19
References	page 20 - 21
Glossary	page 22
Appendix 1	page 23 - 24
Further information	page 25

1. Introduction

Social value isn't new to Bolton at Home. We are a registered provider of social housing with charitable status, and as a responsible business, social value is at the core of everything we do.

Our core business, the provision of affordable social rented housing, creates enormous social value and should not be underestimated. However, we can also do much more, and in the current economic climate, desperately need to do so. This is our second social value policy. It sets out Bolton at Home's approach to social value and describes how our social value policy and core priorities will be delivered for the period 2016/21.

- It should be noted that the term "Social Value" is not defined in legislation. Instead
- social value legislation focusses on achieving the three "pillars" of sustainable development as defined by the United Nations (UN):
- Economic wellbeing;
- Social wellbeing, and;
- Environmental wellbeing.

In the simplest terms, through the implementation of this policy, we are looking to deliver greater improvement to the economic, social and environmental profile of Bolton and surrounding areas.

2. Policy statement

Bolton at Home recognises, and is ensuring that we deliver social value:

- Directly, in the services that we provide for our customers, and in the communities that we work with;
- Through the procurement and commissioning of goods, works and services and
- In partnership with other organisations, enterprises and individual people.

Our creating social value policy covers a 5 year programme (2016- 2021). It will include regular monitoring and annual reviews to assess and report on our progress.

What social value means to Bolton at Home:

There are many definitions of social value, and for that reason Bolton at Home has defined what social value means to us. We have chosen to adopt two definitions in order to broadly explain what social value is, when delivered directly by Bolton at Home, and in partnership with others, as well as social value delivered through the procurement of goods, services and works.

Social value is defined by the Chartered Institute of Housing as:

“The wider non-financial impacts of programmes, organisations and projects, especially on the wellbeing of individuals and communities and of the environment.” (11)

Bolton at Home’s vision is to help support the creation and maintenance of **homes and neighbourhoods we can all be proud of**. This goes beyond the provision of good quality housing, something that it goes without saying, as a social landlord, we are aiming to achieve. Bolton at Home is a registered provider of 18,000 affordable homes, with charitable status, and is a socially responsible business. We have delivered regeneration within Bolton communities, investing in the long term development of our communities, since our infancy. We have long understood that successful community regeneration depends on more than developing and managing homes and we already have a track record of delivering a wide range of activities that go beyond the traditional landlord role.

Social value extends to all services that we provide, in order to support the delivery of our vision. Our services aim to support the economic and social wellbeing of our customers as well as ensuring the environmental wellbeing of each area across Bolton, and its surrounding areas. Across Bolton and its surrounding areas the economic and social profile of residents includes:

- Low educational attainment - 19% of working adults have no qualifications;
- Low wage economy – average weekly income of £465.30 compared to GB average of £518.10;
- High unemployment – 9.9% compared to GB average of 7.7%. Across Bolton there is a very high SME base compared to other regions and few large companies, this limits job opportunities;
- High benefits dependency – 17.8% compared to GB average of 13.61%;
- Long term health conditions – 20.3% of population across Bolton are affected by long term health conditions;
- Diversity – 11% of the population are from BME (Black and minority ethnic) groups (8).

One of our social value core priorities is to:

- promote equity and fairness – target effort towards those in the greatest need or facing the greatest disadvantage and tackle deprivation across the borough.

We will work with our Neighbourhood Managers to design and implement social value projects and initiatives that meet customer needs and demand. We will also seek feedback from our contractors, suppliers and partners to identify customer need. We will work in collaboration with our contractors, suppliers and partners to deliver more within the communities that we work with.

This policy is a key component of our value for money strategy and demonstrates how we can maximise the benefits for our communities from every penny we spend.

Delivering social value in the procurements of goods, services and works:

“Social Value” is not defined in the Social Value Act (2012), but the Act provides a helpful understanding of Social Value as, [support or initiatives that deliver a benefit to the] “economic, social and environmental well-being of the relevant area” (1). Social Value legislation focusses on achieving three “pillars” of sustainable development:

- Economic wellbeing;
- Social wellbeing and;
- Environmental wellbeing.

Social value in procurement is the additional benefit to the community from the commissioning or procurement process which is over and above the direct purchasing of goods, services, and works, including economic, environmental and social well-being or community benefits that can be delivered to a local area. Considering social value within procurement is now common good practice, across all public and private sectors. It goes without saying that Bolton at Home wants to continue to build on our approach, securing and delivering social value in all relevant contracts.

Our Social Value in Procurement Toolkit considers the instances whereby Bolton at Home is bound and enabled by legislation to consider Social Value in its procurement of goods, services and works and the commissioning of services. Further reference is made to our toolkit in section 6 of this policy.

Helping our contractors and suppliers demonstrate Corporate Responsibility (CR):

By working with our contractors and suppliers, to deliver social value, we are helping our contractors and suppliers demonstrate their own Corporate Responsibility (CR). CR is defined by the UK Government, as:

“the responsibility of an organisation for the impacts of its decisions on society and the environment above and beyond its legal obligations, through transparent and ethical behaviour.” (12).

Corporate responsibility is broader than the work that contractors and suppliers carry out with Bolton at Home, it includes all organisational practices that have an impact on the social, economic profile and environment of the area it operates. However, our work with contractors and suppliers helps contribute to their delivery of CR. Commitment to CR will be sought outside of our procurement process.

3. Vision, aims and objectives

As a registered charity, we are governed by our broader charitable objects as described in our Articles of Association.

Our charitable objectives:

- to provide social housing and associated amenities to those in need;
- to support older persons, with disabilities or chronically sick persons in need of social housing, advice and assistance;
- to provide recreation and leisure facilities in the interest of social welfare;
- to relieve poverty amongst the residents of Bolton at Home's properties and the neighbouring area;
- the advancement of education, training and retraining, particularly among unemployed people; and the promotion of urban and rural regeneration.

Social value is therefore at the core of Bolton at Homes charitable objectives.

Our vision:

Bolton at Home's vision is to create **homes and neighbourhoods we can all be proud of**. As our vision outlines, Bolton at Home aims to do more than to simply deliver the traditional landlord role- we are looking to regenerate neighbourhoods, support community development and ensure that our residents live in an area that they are proud of, and that offers them the support and opportunities to maintain a good quality of life.

This policy is a key component in the delivery of a number of our business plan objectives:

- Maximising income for our organisation so that we remain viable, through the work we do (see section 6- our work with contractors and suppliers);
- Maximising income for our customers (see section 3);
- Delivering an efficient and well run business (as detailed, our policy contributes towards our broad business plan objectives).

This policy supports the delivery of the following priority project, outlined within our business plan:

PP1: Renewing our focus on customers and communities by ensuring that the services we deliver directly meet the changing needs of our customers and communities.

This policy enables Bolton at Home to demonstrate its role and evidence how we are operating as a responsible business, fulfilling our charitable objectives, which include social, environmental and economic commitments. To do this we recognise the need to effectively manage risk, by ensuring robust and clear processes, enabled in part by our Social Value in Procurement Toolkit, as well as our 'Delivering Social Value Procedure' which will be developed, following the approval and publication of this policy. We also recognise that this policy relies on the effective management of the relationships we have within our organisation, with our partners and with our contractors and suppliers. Our commissioning officers and the Partnerships Team will take a lead in managing and monitoring these relationships.

Our social value policy objectives:

This policy will reinforce and support the Bolton Vision (2007- 2017), by supporting the economic prospects of Bolton residents, supporting the prosperity of Bolton, and helping support community development (10). Our policy also supports and contributes to the

Greater Manchester Strategy, working with our contractors, suppliers and partners “to create a city region where every resident, neighbourhood and every borough can contribute to and benefit from our shared sustainable future” (2)

Our social value policy objectives are:

- Ensure the money we spend delivers wider social, environmental and economic benefits for our customers and communities, in order to ensure urban and rural regeneration (this includes supporting the delivery of our Environmental Strategy);
- Help our organisation and our partners, contractors and suppliers deliver corporate responsibility through strategic, responsible, and ethical practices;
- Support the provision of, and demonstrate the value of, initiatives and projects that aim to deliver social value for our customers and communities;
- Focus our social value budget on our social value core priorities including, the delivery of our ‘Journey into Work Strategy’ which sets out how Bolton at Home supports our customers into work, and seeks opportunities to reduce in work and out of work poverty;
- Seek commitment to payment of the Greater Manchester Living Wage by our organisation and our contractors and suppliers, in order to reduce “in work poverty” and ensure a sustainable income for our customers (see further information pp.30);
- Ensure targeted local recruitment and training by our organisation and amongst our partners, contractors and suppliers, in order to tackle worklessness;
- Support key organisational policies, that ensure the delivery of social value, including our Journey into Work Strategy, our Environmental Sustainability Policy and our responsible procurement Strategy;

Measure our impact on the local economy and primary and secondary social value outputs and outcomes achieved, in line with our broad policy objectives.

Our social value core priorities:

In order to ensure that our work is both focused and achievable, our social value policy focuses on the following core priorities;

- promote employment and economic sustainability – tackle unemployment and facilitate the development of skills
- raise the living standards of local residents – working towards living wage, maximising employee access to entitlements such as childcare and encourage suppliers to source labour from within Bolton and its surrounding areas
- promote participation and citizen engagement – encourage resident participation and promote active citizenship
- build the capacity and sustainability of the VCSE (voluntary, community and social enterprise) sector – practical support for local voluntary and community groups
- promote equity and fairness – target effort towards those in the greatest need or facing the greatest disadvantage and tackle deprivation across the borough and
- promote environmental sustainability – reduce wastage, limit energy consumption and procure materials from sustainable sources.

These core priorities are the same as the AGMA social value objectives as defined within the GMCA Social Value Strategy from November 2014, but have been updated to reflect the locality which we work (13). For a copy of the AGMA Greater Manchester Strategy, please [click here](#).

4. Financial implications

As the Northern Consortium explains, social value could be one of the key components in the way all sectors in the UK do business that helps to give both a social, as well as a competitive, edge (4). Our approach to delivering social value can help Bolton at Home, our contractors, suppliers and our partners to consider and deliver “added value” when delivering services, producing goods and carrying out works. For example, recruitment on a contract, delivered by one of contractors/ suppliers, can be targeted at employing and increasing the skills of local people. This has a primary benefit for our contractor-ensuring a local skilled workforce. It also ensures Bolton at Home can deliver our policy objectives, set out above. I also achieves secondary benefits for both the local economy as well as lessening the impact on the national economy, from state benefit and support (see the Social Value in Procurement Toolkit for more information).

Since the publication of the post budget summary in 2015, there is both reduced income for housing associations, as well reduced income for our customers, brought about by changes to welfare payments and support. Social landlords are being asked to reduce rents by 1% a year for four years. In order to manage this loss of income some of the previous mitigating actions identified by the Bolton at Home Board have been put into place, including £10m of savings from across revenue and capital budgets. This affects what services we can deliver for our customers, and the resource for each service. Bolton at Home recognises the opportunity to diversify our funding and income streams, to ensure the longevity of crucial services. This policy is one of the ways that we will seek to secure additional funding, support and commitment in order to achieve our organisation and collective regional goals, set out in section 2 of this policy.

Our Social Value Fund

We have established a Social Value Fund to help us deliver social value projects and initiatives that meet our social value core priorities, as defined in section 2 of this policy.

The fund is made up of financial contributions from procurements, and is used to support our social value policy and core priorities. We will require a minimum 1% of the contract spend from suppliers as a contribution to our Social Value Fund for all contracts with a value of £50k (excluding VAT) or above. We will invoice for this payment, separately and in arrears, to each contractor/ supplier, in order to meet VAT requirements. Suppliers and contractors are therefore asked to retain the social value payment, until invoiced by Bolton at Home.

We will ensure that the spend from our Social Value Fund is linked to our social value core priorities and is relevant to the subject matter of contracts. Funding allocation will be determined by Bolton at Home’s Strategy & Partnerships Strategic Theme Management Team under the remit that it is directed towards delivery of our social value core priorities. Spend of the fund contributed to by Bolton at Home’s supply chain in this way will support meeting our social value core priorities.

In order to achieve transparency, and ensure accountability to all of our stakeholders, including our customers, contractors, suppliers, our partners, our auditors and Regulator, The Homes and Communities Agency, we will publish annually on our website, a list of spend summarising what projects and initiatives the Social Value Fund has been allocated towards.

The allocation of the Social Value Fund will be reviewed and agreed each year by our steering group and Bolton at Home’s Strategy & Partnerships Strategic Theme Management Team. Allocation will be strictly in line with addressing the social value core priorities we have identified in this policy and it is envisaged that the majority of the fund will support our *Journey Into Work Strategy* [[click here](#)].

5. Ownership and accountability

It is the collective responsibility of the Board, and ultimately the Chief Executive, to ensure that Bolton at Home conducts its business responsibly and according to our vision and values. However, we recognise that for this policy to succeed we will need ownership from everyone involved in delivering our services.

- Our Director of Strategy & Partnerships, Ian Ankers, is responsible for the strategic ownership and delivery of this policy;
- Our Partnerships Team are responsible for identifying, delivering, measuring, monitoring and reporting on social value outputs and outcomes achieved directly by Bolton at Home, and in partnership with other organisations;
- Our commissioning officers are responsible for identifying, securing and ensuring delivery of social value, identified through the procurement of goods, services and works. The commissioning officers will be responsible for measuring the costs and benefits of social value at pre-procurement stage to be able to fully evaluate tender responses. They will then evaluate delivery of social value, during and at the end of each contract, and the impact this has had against our priorities and target groups. This information will be reported to the Partnerships Team, who will produce an annual report, to ensure accountability;
- Our Partnerships Team are responsible for supporting procurement leads in order to identify relevant and proportionate social value in each invitation to tender (ITT);
- Our Partnerships Team are responsible for ensuring that we monitor and report on social value outcomes and outputs, with the support and information provided by commissioning officers, and organisational outputs and outcomes reported through our performance management framework.

We will establish a steering group who will oversee the delivery of these actions. The group will include relevant staff from across the organisation to ensure collective and coordinated effort in delivering the aims of this strategy. Key members of the group will include:

- A member/ members of our Partnerships Team;
- Our Housing and Economic Coordinators (where relevant projects/ initiatives, or spend from our Social Value Fund is being discussed/ agreed);
- Our Neighbourhood Managers (where needed);
- Our Environmental Sustainability Manager (where relevant projects/ initiatives, or spend from our Social Value Fund is being discussed/ agreed). And;
- Procurement Hub Team members.

Our approach to the engagement of stakeholders aims to ensure that the ethos of social value is effectively embedded across our organisation.

We will do this by;

- gaining senior management and Board support for our social value policy;
- communicating with staff, partners, contractors, suppliers and customers the aims of our policy;
- identifying key individuals, contractors, suppliers, partners, individuals and groups who can help to deliver our social value programme;
- highlighting the benefits of the successful delivery of this policy and;
- ensuring that the required changes are supported by appropriate staff resource and system support.

We will develop a proactive communication strategy and training plan for our staff and other stakeholders, as part of our plans to embed this policy, and to ensure that all staff and our stakeholders are clear about and are committed to our policy aims and objectives. We will ensure that we report on our social value outputs and outcomes to AGMA, to ensure accountability and a joined up approach across the Greater Manchester region.

6. What we will deliver directly

As detailed in section three, this policy supports the delivery of our business plan 'priority project': **PP1: Renewing our focus on customers and communities** by ensuring that the services we deliver directly meet the changing needs of our customers and communities. This includes:

- Ensuring our organisation operates responsibly, and reduces risk to our organisation and tenants through strategic, responsible, and ethical practices;
- Supports the provision of, and demonstrates the value of, initiatives and projects that aim to deliver social value for our customers and communities. This includes:
 - helping customers to sustain their tenancies with us, providing tailored support plans based on individual needs assessments;
 - Maximising customer income through engagement, ensuring uptake of benefits and reduction of debts;
 - Developing behaviour change around energy usage;
 - Creating financial capability through support and training around budgeting, interest rates and financial jargon;
 - Enabling digital access for customers;
 - Measuring how confident customers feel about their finances before and after their engagement with us.
- Focuses our Social Value Fund , to support the local economy, by supporting the delivery of our 'Journey into Work Strategy' which sets out how Bolton at Home supports our customers into work, and seeks opportunities to reduce in work and out of work poverty;
- Ensuring payment of the Greater Manchester living wage by our organisation, in order to reduce "in work poverty";
- Supporting key organisational policies, that ensure the delivery of social value, including our Journey into Work Strategy, our Environmental Sustainability Policy and our responsible procurement Strategy;
- Ensure targeted local recruitment and training by our organisation and amongst our partners, contractors and suppliers, in order to tackle worklessness;
- Measure our impact on the local economy and primary and secondary social value outputs and outcomes achieved, in line with our broad policy objectives.

What we have delivered to date:

- We carry out the Business in the Community Responsible Business Check Up annually. The check up is a benchmarking and gap analysis tool, which we use to track our progress in delivering Corporate Responsibility, as well as benchmarking against others and using guidance to strategically plan improvements. In 2015 Bolton at Home achieved a score of 90%, ranking us in the upper quartile for our

performance. We will continue to use this tool to track performance, learn and improve;

- the development of our UCAN network and the successful introduction of our neighbourhood management approach;
- The delivery of worklessness and employment programmes;
- The delivery of high profile awards that recognise the successful achievements of our staff and customers. Our Customer Involvement Team deliver our in house "Stars of the Community Awards", recognising the contribution made by our residents and staff.

Monitoring social value delivery

In order to assess our delivery of the above projects, we will:

- Annually assess our delivery of 'responsible business' practices, using the Business in the Community (BITC) *Responsible Business Check*. We will implement an improvement plan, working on recommendations made by BITC;
- We will track and report on social value outputs achieved, through our Housing and Economic Coordinators, Ucan Managers and Neighbourhood Managers. We will work with our Business Intelligence Team in order to track outputs;
- We will track and report on social value outcomes achieved. We have been involved in a pilot project, testing Hact social value methodologies, and will continue to evaluate and implement relevant methodologies to evaluate outcomes, and the value of work delivered directly by Bolton at Home, across our organisation;
- Publish qualitative case study research on the outcomes achieved, including the less tangible measures, such as increased confidence gained by our tenants.

Ensuring accountability:

We will produce an annual report for our Board, Strategic Theme Management Teams (STMTs) on the outputs and outcomes achieved, as well as detailing our ongoing progress in ensuring we operate as a responsible business. We will also carry out an evaluation of our activities to understand the outcomes achieved- we have been involved in a pilot project to test HACT Wellbeing Valuation methodology and, the initial results are contained in the Social Value Bank. We are currently evaluating what methodology we will use to track, evaluate and report on outcomes. Our annual report will be shared on our website to ensure accountability to our Regulator, our auditors, and crucially our customers.

In addition, in accordance with the Public Contracts Regulations 2015 ("PCR 2015") where the award of a contract is to be advertised on Contracts Finder, that notice shall report on whether the contractor is a small or medium enterprise ("SME") or a voluntary, community and social enterprise organisation ("VCSE").

We will continue to use the Shift assessment, to evaluate the value of our environmental outputs and to understand the outcomes/ impact on our business and within the local area we operate.

AGMA produces a report detailing the collective social value objectives achieved across the region. The performance indicators are defined on page 69 of the GM strategy. Both individual and collective reporting will help to Bolton at Home assess our individual and collective performance in delivering the social value objectives, set out in this policy (13).

Once we have defined all our social value outputs and intended outcomes, we will develop an evidence base to detail what has been delivered. In order to ensure fair

allocation of funding, our Customer Committee have asked that we map this data, to show what has been delivered where. We will use these maps to identify gaps in provision, and to ensure that we target resource for people/ areas most in need in the future.

7. Working with our contractors & suppliers

As detailed in section two, this policy supports the delivery of our business plan 'priority project': **PP1: Renewing our focus on customers and communities** by ensuring that we work with our contractors and suppliers to deliver social value, during the life cycle of each relevant contract. We will work collaboratively and harness opportunities, expertise and support to directly meet the changing needs of our customers and communities. We will support our contractors and suppliers to deliver and demonstrate their own Corporate Responsibility, and make the most of local resources and opportunities. This includes:

- Ensuring our partners and contractors deliver and can demonstrate corporate responsibility through strategic, responsible, and ethical practices;
- Support the provision of, and demonstrate the value of, initiatives and projects that aim to deliver social value for our customers and communities;
- Focus our social value budget, to support the local economy, by supporting the delivery of our 'Journey into Work Strategy' which sets out how Bolton at Home supports our customers into work, and seeks opportunities to reduce in work and out of work poverty;
- Work with our contractors and suppliers to seek commitment to payment of the Greater Manchester Living Wage by our contractors and suppliers, in order to reduce "in work poverty" and ensure a sustainable income for our customers (see further information pp.30);
- Support key organisational policies, that ensure the delivery of social value, including our Journey into Work Strategy, our Environmental Sustainability Policy and our responsible procurement Strategy;
- Measure our impact on the local economy and primary and secondary social value outputs and outcomes achieved, in line with our broad policy objectives. Ensure a robust and clear reporting framework, to ensure accountability.

We will work with our contractors and suppliers to deliver social value through our procurement process. We are committed to going beyond the minimum requirements of the Social Value Act, to apply it to procurements of all goods, services and supplies contracts of values above agreed minimum thresholds.

We have worked with Anthony Collins Solicitors to develop a bespoke Social Value in Procurement Toolkit which sets out our approach on how to apply our social value policy through contractual relationships with suppliers.

Our Social Value in Procurement Toolkit has a dual purpose and is aimed at supporting staff within Bolton at Home with responsibility for procuring goods, services and works on behalf of the organisation, as well as supporting our contractors and suppliers to understand our approach to social value in procurement. The toolkit provides:

1. an outline of our approach to Social Value and how our Social Value policy and core priorities can be achieved in procurement, and;
2. Practical guidance on how to apply Social Value principles to the procurement process and model wording to be used when drafting procurement documents.

Guidance on applying Social Value in relation to contracts:

Our Social Value in Procurement toolkit must be referred to and applied when procuring all contracts with a value of £50,000 (excluding VAT) or above, including:

- works contracts (including contracts for a mixture of works and services or supplies);
- services contracts and supplies contracts (including contracts for a mixture of works and supplies or services, and services that fall within the Light Touch Regime);
- framework agreements where the anticipated spend from a call off in any financial year is £50,000 (excluding VAT) or above;
- all joint contracts with other purchasers with an anticipated spend of £50,000 (excluding VAT) or above.

We will outline our requirements, within ITTs, specific to the contract. For each contract with a value of £50,000 (excluding VAT) or more, we will consider how to:

1. improve the economic, social and environmental well-being of the area served by it through procurement;
2. undertake the process of procurement with a view to securing that improvement;
3. consider whether to undertake any consultation on that improvement.

The commissioning officer will be responsible for drawing together a project team of people to scope out the social value opportunities of each contract. Our Procurement toolkit provides a template and guide to enable commissioning officers to scope out our social value requirements and include relevant and proportionate social value in each contract. A scoring matrix has been developed to ensure consistency in scoring social value, when assessing tender responses from our contractors and suppliers.

As outlined in section 1 of this policy, in addition to achieving social value through its procurement processes, Bolton at Home also wishes to work with our contractors and suppliers, helping them demonstrate their own Corporate Responsibility (CR). We will therefore also, in addition to the delivery of contractual social value objectives through the procurement processes described above, work with and encourage all of our contractors and suppliers to deliver additional social value through their CR (corporate responsibility) policies and programmes. We will encourage and support all of our contractors and suppliers to work in partnership with us to achieve additional social value, over and above contractual social value objectives, through the delivery of their CSR policies and programmes.

Set out below are some examples of how we have worked with our contractors and suppliers to achieve social value and develop their own CR in a way that supports Bolton at Home's communities. Some of the social value specified below, was not evaluated under the Public Contracts Regulations (2015), but rather was negotiated as voluntary corporate responsibility activity, after the contract was awarded.

Examples of how we have worked successfully with our contractors & suppliers:

We are maximising social value commitments from our suppliers and partners through our formal procurement processes.

Maintenance Framework- long term contract

£70m, 10 year Term Partnering contract, for works- kitchens and bathrooms and external refurbishment, secured and is delivering social value, comprising of:

- 1% contribution towards Bolton at Home's transforming estate fund (circa £60,000 per annum);
- Financial Support for Community Event, of £2,000 per annum;
- 21 paid jobs - Apprenticeships, Trainees & Temporary Jobs;
- Work Placements/Volunteering Opportunities;
- Work based training opportunities, skills development, employability support, including NVQ qualifications for 5 people, manual handling, asbestos and health and safety training;
- 2000 per annum, donated employee hours;
- Support for the community and voluntary sector;
- Local economy re-spend targets & monitoring of 48%.

Fencing contract- short term contract

£1.23m, fencing contract, secured and delivered social value, comprising of:

- 45 donated and delivered hours used to help 'transform estates'. This included clean up days, DIY customer courses, working with Neighbourhood Management teams to deliver community projects and support for housing charities and social enterprises;
- 54 weeks of paid employment. This was an additional 30 weeks, to what was originally agreed, as part of the contract;
- Supporting the delivery of Bolton at Home's Work Clubs through provision of mock interviews, HR support for a CV & interview skills workshop and job shadowing opportunities
- An additional paid employment place, for one of our customers, within their marketing department;
- An additional paid employment place, with a subcontractor;
- 1% contribution towards Bolton at Home's transforming estate fund;
- SME engagement of local suppliers (14);
- Financial Support for Community Events;
- Work placements secured for women, as part of the 'Diversity in the Work Place programme';
- Guaranteed and confirmed 62% local economy re spend;
- Social value created, based on Hact wellbeing valuation, of £500k.

Supply contract-

£1m, supplies contract, with a fleet provider, secured and delivered social value, comprising of:

- 2% contribution towards Bolton at Home's transforming estate fund, £20K value;
- 25 donated hours uses to support Urban Outreach food bank;
- Financial Support for Community Event, of £300 per annum;
- Delivered Local Supply Chain Opportunities.

We have also worked with contractors and suppliers, who have not initially specified what social value they will deliver throughout the life cycle of the contract. Our fleet provider offered social value and CR activities within their tender response, and agreed to work with Bolton at Home to work on a programme of activity. During the first 12 months of the contract, one of their teams volunteered at Urban Outreach's food bank warehouse, for a half day, together with a team from Bolton at Home. The aim of the activity was to support one of Bolton at Home's key charitable partners, develop the relationship between our contractor and Bolton at Home and help our contractor understand Bolton at Home's social value priorities. In the following year, our contractor worked with their supply chain partners to support Urban Outreach's BL15 project which provided free packed lunches to approx. 1000 children a day, across Bolton, during the 6 weeks summer holiday. Our contractor and their supply chain partner, provided a free vehicle for Urban Outreach to use throughout the project for the delivery of lunches across Bolton. In December 2015, our contractor chose Urban Outreach as one of the recipients of their charity Christmas raffle which generated over £1500 for Urban Outreach.

Other examples of how our contractors and suppliers have demonstrated their own Corporate Responsibility, and supported Bolton at Home to deliver CR:

Bolton at Home supports charities and non-profitable organisations across Bolton that support our customers and residents. Each year, Bolton at Home and our contractors and suppliers contribute donations and staff time to help at Urban Outreach, providing lunches for school children and Christmas hampers for families. During Christmas time in 2015, staff from Bolton at Home, and our contractors and suppliers donated 1200 boxes of after dinner mints for Christmas hampers for families across Bolton. One of our contractors kindly donated £250, which bought 500 boxes of mints at Morrisons. We also successfully persuaded the store at Morrisons to donate an additional 100 boxes. A number of our suppliers support the annual Stars of the Community Awards event which recognises local community groups and individuals who have made a difference in their communities. These include: Trowers and Hamlin, TrustMarque, MaxMedia and Effective training & development.

Monitoring social value delivery

Our commissioning officers will be responsible for monitoring the social outputs achieved through procurement from each contract, and will provide the Partnerships Team with an annual position report on each monitored contract. Our WOPM system will be used by contract managers to record and track the delivery of the contract. The Partnerships Team will act as a 'brokerage service' ensuring support for our contractors and suppliers to ensure delivery of the outputs identified.

Over time, Bolton at Home will also evaluate whether to measure the value of this work, using the same methodologies outlined in section 5.

For CR delivered outside of the procurement process (e.g. voluntary corporate responsibility activities secured and delivered), the Partnerships Team will collate information in a social value matrix and report annually on the outputs and outcomes achieved. The matrix will include:

- The CR aim/ objectives;
- The Commitment made by our contractor/ supplier;
- The outputs to be delivered;
- The outcomes to be delivered;
- The frequency of reporting to Bolton at Home, and via which team (if different to the Partnerships Team);
- The named person from our contractor/ supplier who will report on performance;
- Any verification checks needed by Bolton at Home and by whom.

We will ensure that we have input into the process improvement 'WOPM' sessions, to ensure that system procurement and processes include a way for the partnerships team to monitor and report on the above criteria, over time. This will ensure that we move away from relying on manual processes and spreadsheets, towards agreed and some automated processes, supported by appropriate system support.

Bolton at Home will also work with AGMA, and Bolton Council to identify and report on the achievement of our collective Social value objectives, outlined in this policy.

Ensuring accountability:

The Partnerships Team will use data from the reports provided by commissioning officers, as well as outcome information requested from each contractor/ supplier to produce a report. The report will detail both quantitative output data and qualitative case study research, to outline the outputs and outcomes achieved, both within and outside the procurement process. The report will also provide a breakdown of the social value budget, including how the monies were spent, to meet the social value objectives, set out in this policy. This report will be sent to our contractors and suppliers in recognition and in thanks for their work, and to ensure accountability of the throughput of work and outcomes achieved. This report will help our contractors and suppliers demonstrate their Corporate Responsibility, and extracts from the report can be published by our contractors/ suppliers with the permission of Bolton at Home. A summarised and version of the report will also be shared with Bolton at Home's STMT, to ensure transparency and accountability and seek ongoing commitment to the aims of this policy. The report will also be shared with our steering group, in order to ensure transparency and accountability.

Our processes are documented in the Toolkit procurement flowchart on pages 21 and 22.

How we will deal with non or poor performance

Non or poor performance on a contract, will be managed by the contract administrator. Where a contractor or supplier has not delivered the social value contractual obligations made, and Bolton at Home has taken reasonable steps to help the contractor/ supplier to deliver the specified social value, Bolton at Home will advise the contractor/ supplier that they are in breach of contract.

Section 8. Working with our partners

We recognise we can achieve more social value by working with other organisations. We want to develop our partnerships with corporate partners, and VCSE organisations (voluntary, community and social enterprise organisations) to maximise the social value we can deliver.

So far, we have worked with corporate partners such as Asda, B&Q, Trowers & Hamlin solicitors, Warburtons, Forrest, Seddon and Bolton Wanderers Football Club to deliver social value. We also work in partnership with a range of local VCSE organisations including Bolton Urban Outreach, Bolton Wanderers Community Trust, Bolton FM, Raise the Youth, Hoot, Fortalice, Paws for Kids, Bond Board, Bolton Sunday League, Octagon Theatre and CVS. Our approach to supporting VCSE organisations is set out in our framework document on supporting VCSE organisations.

We will continue to work with our existing partners and develop new partnerships to meet the social value objectives set out in this policy. We will develop a more strategic approach to stakeholder management and are carrying out stakeholder mapping and planning.

In evaluating the opportunities to work in partnership with other organisations, we will use the below business case and risk assessment framework, adopted and adapted from the 'Inspiring and creating Social Value in Croydon' toolkit. We will aim to use this framework for the development of all partnership opportunities.

	Questions
1. Be clear what you want:	<p>Why are we doing this? Identify the requirement- what do we want to deliver and why?</p> <p>What are we trying to achieve? 1. Identify what outputs we are trying to deliver (For example. number of work placements) 2. Identify what outcomes we are aiming to deliver (For example- work placements leading to increased skills, confidence and primary and secondary cost savings from less intervention from Bolton at Home and less state support)</p>
2. Evaluation of the market:	<p>Who is doing what in the market/ sector? What partnership opportunities exist, from organisations with similar goals? Are there opportunities to learn from others- do we need to reevaluate our initial business case, to meet new aspirations?</p>
3. Risk assessment	<ul style="list-style-type: none"> Evaluate any financial risks of working in partnership. <i>NB partnership work, tends to carry a lower risk particularly where there are non-contractual agreements.</i> Governance- evaluation to ensure that any organisation we are working with is properly constituted; Employment of staff- evaluation to ensure staff are properly managed <ul style="list-style-type: none"> Equal opportunities policy; Health and Safety Policy; Support and supervision of staff. Competence to help provide the service- understanding the needs of the residents that will be

	Questions
	<p>involved in the project, if appropriate.</p> <ul style="list-style-type: none"> • Safeguarding – working with vulnerable adults or children • Evaluation of any other potential reputational risks to our partner and/ or Bolton at Home.
4. Approach and selection of partner	Based on the above criteria. Create an accurate record of why we have selected to work with a partner, and the business case, detailing the above.
5. Agreement of working in partnership	Agree outputs and outcomes required, and how we will monitor delivery. Standard partnership agreements to be used for all partnerships where Bolton at Home expenditure is over £3k per annum.
6. Monitor, manage delivery and agree a reporting framework	Standard monitoring approach to be used for all partnerships.
7. Evaluate the success of the partnership, and agree future working principles.	Bolton at Home will agree with the partner how and at what point this evaluation will take place.

Monitoring social value delivery

Bolton at Home will work with AGMA, and Bolton Council to identify and report on the achievement of our collective Social value objectives, outlined in this policy. We will work with our Business Intelligence Team to develop appropriate measures to track and evaluate the impact of the work that we have carried out with our partners.

Examples of how we have worked successfully with our partners:

- We are working collaboratively and supporting HOOT, Bolton’s credit union, which is supporting customers from Bolton, Bury and surrounding areas. Hoot provide accessible saving and affordable loans to members, reducing the potential negative financial impacts on our customers and residents within the communities we work with;
- Business in the Community (BITC) “Responsible Business North West Local Recognition Accolade”. This award certifies recognition of responsible business activity within the local community. Bolton at Home were awarded the Collaborative Action Accolade, in 2015, for our partnership work with Asda, Barclays, Seddon, United Utilities and Warburtons. Our recent assessment by BITC in 2015 ranks Bolton at Home in the upper quartile of responsible businesses. Bolton at Home achieved a score of 90%, an increase of 5%, from the previous year;
- We are working in partnership with a range of local partners to create new job opportunities, including Bolton Council, Workshop; Jobcentre Plus and Bolton College. We also work strategically with Team Bolton to deliver collective objectives (see appendix 1);
- The Green Café partnership between Catering Academy and Bolton at Home is committed to supporting the local economy. We do this by using suppliers from Bolton and across the North West and by creating work and volunteering opportunities for local people. We provide training and employment for local people, and to offer volunteering opportunities for our customers, providing them with skills and experience that can help them secure paid work, potentially in catering and

hospitality. We're also committed to improving the health and wellbeing of Bolton at Home staff by promoting healthier eating and living.

- Bolton Wanderers Community Trust is committed to working at the heart of the community to narrow the disadvantage gap in health, education, inclusion and disability whilst providing quality experiences for participants through the use of sport, while acting as role models to inspire people and change lives. Bolton at Home has been working in partnership with BWCT since 2013 with an aim of the partnership to get hundreds of young people from across estates in Bolton through the Kicks initiative. Kicks has given over 400 Bolton teenagers professional sports coaching, opportunities to gain qualifications and volunteering experiences.

References:

1. Section 1 (3)(a) *The Social Value Act* [Online] <http://www.legislation.gov.uk/ukpga/2012/3/enacted> [Accessed 10 July 15]
2. GMCA (2013) *Greater Manchester Strategy* [Online] http://www.agma.gov.uk/gmca/gms_2013/index.html [Accessed 14 July 15] pp. 21.
3. [Department for Business, Innovation & Skills](http://www.gov.uk) (July 2015) *Fixing Foundations: Boosting Britain's Productivity* [Online] <https://www.gov.uk/government/speeches/fixing-the-foundations-boosting-britains-productivity> [Accessed 14 July 15]
4. Taylor (June 2015) Why is generating social value so important to smart cities? *Northern Consortium* [Online] <http://www.northern-consortium.org.uk/2015/06/15/bob-taylor-why-is-generating-social-value-so-important-to-smart-cities/> [Accessed 14 July 15]
5. Business in the Community (2010) *A Toolkit for Social Landlords* [Online] http://www.bitc.org.uk/system/files/toolkit_for_social_landlords.pdf [Accessed 10 July 15]
6. Business in the Community (2015) *Responsible Business Check up* [Online] <http://www.bitc.org.uk/services/benchmarking/responsible-business-check> [Accessed 08 July 15]
7. Cabinet Office (2015) *Social Value Act Review* [Online] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/403748/Social_Value_Act_review_report_150212.pdf [Accessed 14 July 15]
8. Bolton Vision Partnership (C/O Bolton Council) (2007) *Bolton: our vision 2007- 2017* [Online] http://www.bolton.gov.uk/sites/DocumentCentre/Documents/Bolton_Our_vision_2007-2017.pdf [Accessed 12 November 15]
9. Croydon (2015) *Inspiring and creating social value in Croydon* [Online] <https://www.croydon.gov.uk/sites/default/files/articles/downloads/socialvalue.pdf> [Accessed 12 November 15]
10. Department of Work and Pensions (2011) *Employment Retention and Advancement (ERA) demonstration: The Impact on Workers' Outcomes* [Online] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/214534/rrep759.pdf [Accessed 13 November 15]
11. Chartered Institute of Housing (2015) *New approaches to delivering social value* [online] <http://www.cih.org/resources/PDF/Policy%20free%20download%20pdfs/New%20approaches%20to%20social%20value.pdf> [Accessed 24 November 15]
12. UK Government (2014) *Corporate responsibility: call for views* [Online] <https://www.gov.uk/government/consultations/corporate-responsibility-call-for-views> [Accessed 24 November 15]
13. AGMA (Association of Greater Manchester Authorities) and GMCA (Greater Manchester Combined Authority) (2013) *Stronger Together: Greater Manchester Strategy* [Online] <https://www.greatermanchester-ca.gov.uk/downloads/file/8/stronger-together-greater-manchester-strategy> [Accessed 22 December 15]

14. Section 3 (39) Small Business, Enterprise and Employment Act
<http://www.legislation.gov.uk/ukpga/2015/26/part/3/enacted> [Accessed 25
February 2016]

Glossary:

AGMA (Association of Greater Manchester Authorities)

Corporate Responsibility (CR)- CR is defined by the UK Government, as:

"The responsibility of an organisation for the impacts of its decisions on society and the environment above and beyond its legal obligations, through transparent and ethical behaviour." (12).

GMCA- Greater Manchester Combined Authority.

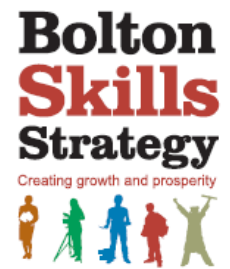
Social value- It should be noted that the term "Social Value" is not defined in legislation. Instead social value legislation focusses on achieving the three "pillars" of sustainable development as defined by the United Nations (UN):

- Economic well being
- Social wellbeing and
- Environmental wellbeing

In the simplest terms, through the implementation of this policy, we are looking to deliver greater improvement to the economic, social and environmental profile of Bolton and surrounding areas.

VCSE (voluntary, community and social enterprise) sector.

Pledge Your Support



“ As part of the Greater Manchester Commitment I support skills development in Bolton, and will help to improve employment and training opportunities for the Bolton Family. ”



www.businessbolton.org



I would like to make a commitment to skills development and supporting people into employment in Bolton, and find out more about:

- Advertising vacancies locally and recruiting Bolton people
- Working in partnership with Team Bolton
- Offering mentoring / apprenticeships / work experience placements for young people and job seekers
- Working with schools to raise awareness of business and enterprise
- Supporting employment programmes for people who have a disability
- Championing my sector and the Bolton Employer Pledge

Please contact me to discuss this, my contact details are:

Name:

Email

Company:

Telephone:

Further information:

- The UK **National Minimum Wage** (NMW), currently in place, is set at **£6.70**, for people 21 years old and above, **£5.30** for people between the ages of 18- 20 and **£3.87** for under 18s. The rate for apprentices is set at **£3.30**;
- In the July budget, the Government passed legislation to make the payment of the **National Living Wage** (NLW) mandatory for workers aged 25 and above, with affect from April 2016. The National Living Wage (NLW) is set at **£7.20** from April next year, for workers aged 25 and older. The minimum wage will still apply for workers aged 24 and under;
- **The Greater Manchester Living Wage campaign** aims to increase the number of employers in Greater Manchester who voluntarily pay an enhanced living wage rate. The rate that they campaign for is set independently and updated annually by Loughborough University and the Joseph Rowntree Foundation. The rate is calculated according to the basic cost of living in the UK. In November 2014, they set a Living Wage rate, applicable for Greater Manchester, at **£7.85** per hour, which will rise to **£8.25** per hour from April 2016.