



Waltham Forest

# Social Value Annual Statement 2023 - 2024

London Borough of Waltham Forest

SOCIAL VALUE STATEMENT



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# APPROACH AND INTENTIONS IN RELATION TO SOCIAL VALUE

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

The Council is committed to a performance and evidence-based approach to Social Value. The purpose of social value is to deliver community benefits above and beyond the basic contract terms for external contractual spend and to secure additional social benefits in line with the Council’s identified priorities.

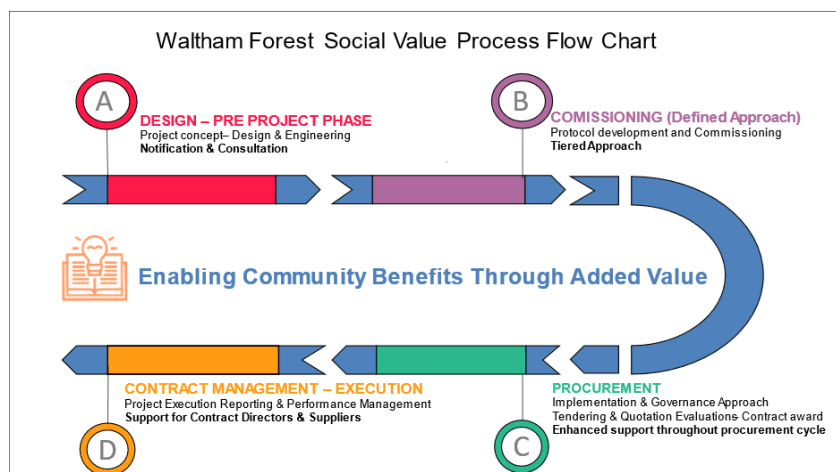
The Council’s Social Value objectives have been developed to support the vision, priorities, and actions of The Council’s corporate strategy to make London Borough of Waltham Forest the “Borough of Excellence”.

The Council has adopted the following definition of Social Value, as developed by the Sustainable Procurement Task Force:

*‘A process whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and the economy, whilst minimising damage to the environment’*

In December 2020 the Council established a dedicated Social Value function within the Return on Investment (ROI) umbrella, to drive additional value for every pound the Council spends with third party suppliers and unlocks genuine benefits for our communities, residents and environment.

Now social value within the Council has matured and has been embedded and mandated into our commissioning and procurement processes to generate genuine and measurable benefits co-designed with our residents and communities.





# KEY AREAS OF FOCUS

The key areas of focus have been identified using new Corporate Framework baseline and aligned with The Council’s core priorities:

The Council vision is organised around three core themes that will underpin all the work we do together as residents, council, and partners. The 15-Minute Neighbourhood approach provides a new way of delivering more inclusive, accessible, vibrant, and healthy neighbourhoods in Waltham Forest. It enables people to have a say in shaping the future of their neighbourhoods and allows the Council to respond to residents’ needs through bold, tailored interventions. This will provide the foundation for long-lasting change in Waltham Forest, helping create a fairer borough where every resident can thrive.

## THEME 1:



### EVERYONE TAKING PART AND FULFILLING THEIR POTENTIAL

- Healthy Neighbourhoods
- Community Safety
- Climate Emergency
- Young People
- Culture and Diversity

## THEME 2:



### EVERYONE BENEFITING FROM SHARED PROSPERITY

- Access quality learning, skills and employment
- Affordable quality homes
- Destination for all; socialising, leisure and play
- Open and accessible public spaces
- Support within easy reach

## THEME 3:



### SHAPING THE BOROUGH TOGETHER

- Connecting people to their neighbourhoods
- Co-designed with local residents
- Data driven insights
- Collaborating with local partners
- Maximising impact of 15-minute Neighbourhoods

Social Value continues to align with the Council corporate priorities, ensuring that outputs are bespoke with hyperlocal approach, interventions that are co-designed with communities generates positive impact and delivers tangible and meaningful outcomes.

# INTERNAL ENGAGEMENT, COMMUNICATION AND MANAGEMENT OF SOCIAL VALUE

Social value is clearly defined in the Council’s procurement rules and social value considerations are taken into account in all exercises above the Public Contracts Regulations (PCR) threshold, with social value criteria included in tender documentation and contracts. The Council also has taken a lead amongst other local authorities by implementing robust contract management processes in place for monitoring/implementation to ensure that commitments are adhered to, in the same way that Quality and Cost could also be considered..

Waltham Forest has developed a Social Value Policy, which sets out the Council’s approach to social value, based on the nationally recognised “TOMs” framework (“Themes, Outcomes, Measures”), which encompasses a comprehensive range of outcomes, and provides an objective means of quantifying the actual value of each outcome.

When inviting bids for contracts above PCR thresholds, it is mandatory that a minimum of 10% of the evaluation weighting is allocated to social value. The Council requires bidders to submit the social value element of their tender submissions via the online Social Value Portal. To do this, bidders must register for free with the Social Value Portal.

Targets and actions relating to sustainability (and other social value objectives) are a mandatory requirement in Strategic Commissioning Board (SCB) business cases. SCB is a senior officer panel that convenes monthly to peer review procurement business cases and contract management activities for goods and services contracts with a value exceeding the PCR threshold (Currently £177k) and for works contracts with a value exceeding £1m).

For all procurement processes relating to contracts for goods, services or works worth more than £1m, it is also a requirement that these business cases are scrutinised and approved by the Council’s Cabinet (or, at a minimum, a Cabinet member).

In Waltham Forest, officers with procurement responsibilities also receive training on Social Value which is in line with the Social Value Policy.

## SOCIAL VALUE ROLES AND RESPONSIBILITIES ARE DISTRIBUTED AS FOLLOW

### **Social Value Portfolio Holder:** Strategic Director of Finance & Governance

#### **Head of Social Value and Social Return on Investment**

Leads on Social Value strategy  
Oversees the Social Value delivery across the Council  
Reports on the Social Value Strategy implementation and delivery

#### **Social Value Manager**

Supports officers in considering and assessing Social Value delivery  
Responsible for widening the Social Value agenda  
Ensures all procurement include a Social Value element

#### **Contracts Managers**

Monitor Social Value delivery through their contracts  
apply remedies in case of non-delivery

#### **Social Value Supplier and Quality Lead**

Leads on quality assurance, data compliance and regular reports  
Leads on impact monitoring of all contracts  
Ensures all procurement templates and documentation (Instruction to Tenderers - ITTs, Contracts, Supplier Guidance, Contract Standing Orders) are updated

# IMPLEMENTATION APPROACH FOR EMBEDDING SOCIAL VALUE

Social Value is considered at all phases of the contract lifecycle, from commissioning to procurement to contract management, to ensure that it is appropriately embedded across all projects. It is introduced at the design phase to initiate conversation and guide the Council in what could be achieved where there is an expectation to maximise what could be realised.

During the commissioning phase a detailed approach is determined and approved through the Council's Gateway approval process and Cabinet approval processes where required. When social value is not to be included in an activity, either due to proportionality or appropriateness, or where the mandatory 10% weighted criterion is to be amended, this is documented, challenged and passed through the appropriate governance processes linked to the activity.

The procurement phase produces a response from the market and social value evaluated based on quality and quantity against the mandated 10% weighted criterion. Where the Council maintains or supports a wholly owned company or joint venture opportunities there is an expectation that this arrangement continues to follow the Council's approach to maximise social value. This ensures consistency with the surrounding market and feeds into the priorities identified and delivered through the Council services.

The Social Value in the Council is measured and reported through the Social Value Portal for consistency and transparency, using dedicated Council measures called Waltham Forest TOMs (Themes, Outcomes & Measures). Social Value measured as the actual activity being created e.g. jobs, apprenticeships etc plus also the economic impact in GBP to an area of these activities..

The Council's intention is to ensure that our supply chain contributes as much as possible to the overall wellbeing of our residents and we therefore include Social Value as part of the procurement process. When tendering to supply goods, services or works potential suppliers are required to provide details and evidence of how they meet the Council's corporate priorities. All suppliers are required to define target outcomes they will achieve across the lifetime of the project and submit a Social Value Method Statement detailing how they will achieve those targets. This approach allows the Council to contract manage the Social Value element efficiently and monitor the outcomes for the duration of the contract, but without setting social value targets, which would then become a costed item within the specification rather than a unique value add that a provider can give.

Throughout the contract management phase social value is monitored and enforced against the contractual commitments devised during award via dedicated contract managers. Contract managers are required to report social value delivery centrally to champion Council wide success and scrutiny.



# INTERNAL SUPPORT AVAILABLE TO ACHIEVE TARGETS AND AMBITIONS

Social Value links into the Council's corporate priorities and all workstreams have an element of generating social, economic, and environmental impact within the borough. Educating officers is key to having ambassadors and champions that can advocate for Social Value. Educating internally will ensure a stronger presence of Social Value within the council and a greater impact on the delivery of contracts across different workstreams. We ensure that all staff have access to the Social Value Policy as well as the TOMs framework so that they are aware on how the council defines Social Value and how it is captured through our contracts.

The Waltham Forest Social Value Measures (WF TOMs) are comprised of two lists, the Master TOMs – that contains 52 measures and the Golden TOMs which is a streamlined version of the Master list and comprise 22 measures. Both sets of WF TOMs have been specifically designed to align to the council's corporate objectives and are used this for Social Value reporting.

The Council has worked closely with Social Value Portal to create the TOMs framework for the borough. Staff will be able to understand how to embed Social Value within their contracts and they will receive recommendations from the SV team according to our tiered approach. The Step-by-step guide included in the SV toolkit will help to train staff on how Social Value is embedded at different stages in the procurement process.

The Council staff will be equipped with the following to ensure that they are fully trained on Social Value:

## **SV E-learning Module(s)**

This module(s) will and ensure that staff are trained on the basics of Social Value within LBWF. This will contribute towards their Continuing Professional Development, and it will also enable staff to embed Social Value within their workstreams.

## **Social Value Surgeries**

The Social Value team will hold regular Social Value surgeries to ensure that all directorates are educated in the approach to Social Value. The Social Value team will deliver the necessary learning to respective directorates, to provide comprehensive introduction to Social Value and explain further the measurement, monitoring, and reporting processes. Best practice will be shared, and recommendation made for how respective directorates can contribute towards the improvement of social, economic, and environmental impact within their roles.

## **Social Value Toolkit**

The Council Social Value Toolkit equips staff with the knowledge on our tiered approach to embedding Social Value on contracts. It also helps staff to understand how Social Value is included from early stages of project design and business case formation, through procurement and finally onto contract implementation. The Social Value Toolkit also includes the Social Value Fund process that covers the cash donations and in-kind contributions made by the suppliers. The distinction between Social Value and section 106 included in the toolkit provides clear explanation the council's approach to creation of community benefits for and provides clear direction to maximise the positive impact generated under the three pillars of socially, economically, and environmentally.



# INTERNAL SUPPORT AVAILABLE TO ACHIEVE TARGETS AND AMBITIONS

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## **Market Engagement and Suppliers Training**

The Council has established a Supplier Improvement Function which sits in the Procurement team. The ultimate aim of this function is to equip Contract Managers and Project Directors with necessary social value knowledge that will substantially increase the quality of contract delivery. The training consists of two modules and covers social value introduction, the Council approach, measurement, and impact monitoring as well as progress reporting of relevant outcomes at all stages of the project cycle.

## **Collaboration with Internal Teams**

The Council Social Value Team have established strong connections with internal services and departments to enhance the collaborative working and raise wider awareness on Social Value and the ambitions to push the agenda throughout the borough. Regular meetings are scheduled in with the Council's Procurement, Employment, Business & Skills and Planning teams. These meetings help to keep a dialogue on both workstreams and how to best collaborate to increase the positive impact on our internal projects and contracts within the borough.

Social Value Portal is our single reporting framework, and we demonstrate its effectiveness to relevant staff members by providing some members with access to view the progress. Technology is at an efficient standard within the SV workstream, and the above methods prove to be successful in raising awareness on the impact that Social Value is generating on our projects along with the good news stories of the positive benefits that social impact brings to the borough.



# COLLABORATION, EXTERNAL ENGAGEMENT AND SUPPORT AVAILABLE TO PARTNERS THAT WANT TO CONTRIBUTE TO CREATING PLACE BASED SOCIAL VALUE

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The Social Value Team at the Council is fully committed to ensure our suppliers are supported throughout the lifetime of their contracts. Our WF TOMs framework measures both financial and non-financial outcomes and all suppliers are provided with detailed instruction and supplementary guidance provided at the tender stage.

Pre-delivery inception meetings are arranged with awarded suppliers, as a steppingstone towards development of mutually beneficial partnerships.

Supplier relationship management is vital, and we engage with all suppliers on a regular basis. Our function organises an onboarding meeting and once projects are more established, we build up a support network internally to connect the suppliers with [each other and the wider community]. Our suppliers are our valued partners, and we work with them in collaborative way to ensure meaningful support is provided through internal and external networks.

The Council holds quarterly developers' forums with all major construction organisations. The forum is chaired by our developers and provides opportunity for sharing best practice, discuss challenges and identify and implements improvements. We have built a strong cohesion between section 106 and Social Value to clearly portray both avenues to our developers so that they can maximise the social, economic, and environmental outputs and outcomes on their respective projects.

Commitments made by suppliers are reported on via the Social Value Portal –, our suppliers receive appropriate support to ensure that they can navigate through the system to upload their delivery on a timely basis. Regular dialogue is kept by building and maintaining the strategic partnerships with the suppliers to ensure the interventions are bespoke and based on community priorities and needs.

Suppliers are briefed by the Council and Social Value Portal on evidence requirements at monthly supplier engagement sessions and meetings with Social Value team. Evidence of social value delivery is verified by the Social Value Portal. Further verification can be requested by the Council if the evidence provided isn't sufficient or requires additional clarification.

Social Value Progress Reports for the Cabinet Members and Senior Leadership Team are designed and produced on quarterly basis. They provide up-to-date information, highlights and achievement for the Social Value progress on all contracts. An annual report that comprised of comprehensive information and features case studies and good news stories is created at the end of each financial year. Going forward the annual report will be developed and presented to Members and Senior Leadership Team alongside the Council's financial report.





# PERFORMANCE MANAGEMENT

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Social value is measured in both financial and non-financial terms using The Council dedicated Waltham Forest TOMs Framework and commitments made by suppliers are reported on and monitored during the implementation of contracts. The delivery of social value that is committed is tracked at varying levels within the Council, at contract level via contract managers where suppliers provide evidence that is scrutinised, at departmental level via reporting centrally where challenges are undergone against what is provided and organisationally via quarterly member and management boards alongside advertising success to the public.

To demonstrate the wider impact of the Council’s investment programmes, as well as to support future decisions, the Council developed priority impact measures to assess outputs and return on investment from its Capital Portfolio and published in the annual Capital Strategy. These measures are linked to the Waltham Forest TOMs and include delivery of physical outputs as well as employment and skills outcomes for local people, such as construction jobs, apprenticeships, and work experience placements.

The priority impact measures are regularly monitored across the capital investment portfolio, by collating project/programme-level data on physical benefits and information captured on the Social Value Portal and monitoring information on Developers Contributions agreed through the Planning process (i.e., s106 agreements).

Climate Emergency Action Plan and developing strategy, as well as expanding on the established metrics to further capture the impact of our investment on residents, communities, and businesses. This approach has the potential to significantly increase the benefits we deliver in the coming years, developed through our 15-minute Neighbourhood model and pilots.





# ACHIEVEMENTS AND BENEFITS REALISATION

Employment and Skills opportunities: Sustainable, fair and well-paid jobs are our residents' top priority. We want to make sure all residents can fulfil their potential and find rewarding work. Social value route generates additional employment opportunities that provides career aspirations, ensuring that disadvantaged and marginalised groups are equally supported.

The Council Employment & Skills Team delivers holistic, wrap-around support to our residents and takes a lead role helping employers advertise and hire locally.

The Council ensures our residents can easily find sustainable, fair and well-paid jobs opportunities on a live jobs feed, and every Council worker is able to signpost people to help and support and engages with local and London wide businesses to help create jobs.

## SOCIAL VALUE - DELIVERED OUTCOMES



CONNECTING PEOPLE WITH JOBS  
£27,812,226

LOCAL EMPLOYMENT  
621 SUSTAINABLE JOBS  
APPRENTICESHIPS  
5,709 WKS  
WORK EXPERIENCE  
548 WKS



CONFIDENCE IN OUR FUTURE  
£685,273

CAR MILES SAVED  
6,811 MILES  
WASTE REDUCTION  
7,233 TONNES  
CARBON REDUCTION  
379 TCO2E



SAFE AND HEALTHY LIVES  
£709,864

VOLUNTEER HOURS  
6,382 HOURS  
VCSE SPEND  
£497,513  
COMMUNITY SUPPORT  
£769,730



OUR 15 MINUTE NEIGHBOURHOOD  
£7,166,059

LOCAL SPEND  
£11,485,558  
EXPERT HOURS  
6,190 HRS  
MSME SUPPORT  
£16,800



## ACTIONS AND NEXT STEPS FOR DELIVERY

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The Council continues to work closely with our current development partners and contractors on innovative solutions to maximise Social Value delivery through our investment programmes.

The Social Value Delivery Plan will be developed and sign off by the Strategic Director of Finance & Governance and will provide a comprehensive profile of the actions, deliverables, resources, and timescales to achieve the ambitions outlined in this statement as well as the social value benefits have been realised for that period.

Regular reports with progress update will be developed on quarterly basis and distributed to all key partners and strategic stakeholders.

We will continue to ensure that all our suppliers consider and maximise social value and create initiatives to positively impact our communities in which we serve, both during the course of the commissioning & delivery phase.

Building on the new 15 min Neighbourhood Framework strategy, we will ensure that social value approach is fully aligned with its core aims. We will work with our suppliers to maximise social value interventions that are genuine and meaningful, based on our residents' priorities, shaped around our community needs and deliver the desired, positive impact that benefits all in the Borough.





Waltham Forest

SOCIAL VALUE ANNUAL  
STATEMENT 2023 - 2024

