

Social value



Directorate: Communities

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Document Information

Scope:

The purpose of this document is to set out Salix Homes' approach to managing and delivering Social Value

The objectives of this policy are:

- Embed Social Value across the organisation ensuring we continue to deliver on our vision of helping our communities live, grow and thrive together'
- Utilise every potential opportunity to create social value, supporting more jobs, stronger local economies, healthier customers, vibrant communities and supporting an environmentally sustainable future.
- Deliver additional value through commissioning and procurement and work with partners so that the benefits will multiply through a collaborative approach.
- To ensure that Salix Homes and our partners comply with social value legislation.
- Ensure Social Value principles are applied in a way that enables us to maximise economic, social, and environmental wellbeing for our customers and communities.
- To measure the social value we create, ensuring value for money
- To measure the social value of a Salix Homes tenancy which we can benchmark against partner organisations
- To produce a Social Impact report annually which will contain quantitative and qualitative data including real life customer case studies

Service Standards / Performance Measures / Corporate Strategy:

Through this policy and the use of the HACT social value monitoring tool we will measure the benefits that our services and programmes bring to our customers and communities including:

- Skills and work opportunities
- Training and apprenticeships
- Supporting customers to improve their digital skills
- Volunteering
- Supporting customers to access benefits and maximise their income
- Providing free upcycled furniture and access to food vouchers to customers in financial hardship
- Promoting health and wellbeing activities
- Supporting people to move from unsuitable/temporary accommodation
- Support to successfully sustain a tenancy
- Having a good quality home

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- Access to attractive, safe green spaces
- Springboard grant initiatives
- Work with partners to provide access routes to support services
- The overall social value of a tenancy with Salix Homes

Social Value will be embedded within procurement and will be measured through the achievement of wider financial and non-financial outcomes, including improving the local economy, wellbeing of individuals and communities, social value, and improved environments.

The procurement team will include social value in all contracts with a value that exceeds £50,000, and potential suppliers will be asked to submit details on how they will deliver social value through delivery of the contract.

The social value that can be achieved will vary depending on the works/services/goods being procured, however, we will ensure that the requirements are aligned to Salix Homes and our Customers’ requirements, considering government and Greater Manchester strategies and policies.

We will use the below methodology to measure the social value within the procurement exercise and the final delivery.

Financial

A percentage target of the contract value will be identified for each project, with the following used as a method for calculating the benefit achieved:

- Using the appropriate HACT model where a value can be attributed to the social value
- If a cashable incentive is offered this will be the simple calculation of £’s delivered
- If ‘free of charge’ labour or materials are proposed, an hourly/daily rate, plus materials cost will be calculated

Non-Financial

Where a financial value cannot be attributed to the social value proposal a list of requirements/desired outcomes that are specific to Salix Homes and our Customers will be created, with a credit score awarded to each of the requirements/outcomes.

Contract Management

The ongoing contract management is critical to ensuring what is offered at the RFQ/ITT is delivered.

The Contract Manager will agree a standard report with the key stakeholders and will be responsible for monitoring the contract delivery performance and providing the appropriate reports.

Risks:

- SR28 Quality of Neighbourhoods / communities

Mitigations

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- Salix Homes is engaged in social value giving activities through employment and enterprise activities as well as poverty and social exclusion services
- Salix asset management strategy takes appropriate account of social value.
- Salix produces an annual narrative report setting out the evidence for the social and other value produced as a result of its activities. This is included in its annual self-assessment of value for money, which is required for regulatory reasons.
- Salix encourages the use of apprenticeships as part of the procurement process.

- SR45 - Efficiency including procurement

Mitigations

- Strategic Procurement Group established
- Procurement Team established within Salix Homes
- Develop a Procurement Panel
- Develop operational plans to improve and measure targets
- Develop & monitor a VFM framework for reporting savings incorporating social value
- Approved Procurement Strategy in place with centralised contract management platform (Delta)

Indirectly related risks:

- SR24 – Damage to reputation (re. learning from complaints)
- SR25 - Housing Management / Customer services standards (re. customer voice and feedback in being able to shape services)
- SR36 - Asset management v standards and financial & social returns (re. Disrepair policy)
- SR43 - Customer take up of digital services (re. better access to services)
- SR46 - Tenancy Sustainment incorporating safeguarding (re. supporting customers in financial hardship / safeguarding)

Related Policy/Procedure & Documents:

- Corporate Plan
- Financial Business Plan
- Governance Framework, incorporating the Financial Regulations
- Procurement Guide
- Procurement Policy
- Value for Money Strategy
- Contracts Register
- Anti-Fraud Register
- Asset management Strategy
- Equality, Diversity, and Inclusion Policy
- Wellbeing Strategy
- Health and Safety Policy
- Anti-Slavery & Human Trafficking Policy
- GDPR / Data Protection Policy
- Risk Management Strategy

| Document Information |
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| <p>Related Legislation / Relevant Regulation:</p> <p>Salix Homes has a duty to ensure that all social value / procurement is conducted in accordance with the following legislation:</p> <ul style="list-style-type: none"> • EU Procurement Directive 2014/24/EU, implemented into UK law by the Public Contracts Regulations 2015 • The Health and Safety at Work Act 1974 • The Data Protection Act 2018 • The Freedom of Information Act 2000 • The Bribery Act 2010 • The Equality Act 2010 • The Public Services (Social Value) Act 2012 • Leasehold and Reform Act 2014 (section 20) • The Modern Slavery Act 2015 |
| <p>Retention & Legal Basis for Storage:</p> <p>The legal basis for processing for all Salix Homes activities are stored within the Information Asset Register.</p> <p>The retention period for all Salix Homes activities are stored within the Data Retention Schedule.</p> |
| <p>Stakeholders:</p> <p>Consultation taken place with</p> <ul style="list-style-type: none"> • Wellbeing Taskforce • Audit Committee • Salix Homes Customer Committee • Customer Procurement Panel |
| <p>Data Protection Impact Assessment (DPIA) DPIA Completed</p> |
| <p>Equality Impact Assessment (EIA) EIA Completed</p> |

1. Introduction

- 1.1 Social Value is embedded in our vision and values, our corporate plan, our strategies.
- 1.2 As a social housing provider investing in homes, we have a significant opportunity to create social value: more jobs, stronger local economies, healthier customers, vibrant communities and supporting an environmentally sustainable future.
- 1.3 Our work at Salix Homes goes beyond the provision of housing and support by tackling wider social, economic, and environmental challenges and working to make our communities more sustainable. We provide opportunities for our customers to make better choices, for staff to have worthwhile and fulfilling roles, for suppliers and contractors to have stable, on-going work and for partners to deliver more by working together.
- 1.4 Salix Homes spends approximately £27,960,204 each year on goods, services and works. If targeted, this spending has the capacity to provide substantial social value benefits. These benefits will improve the quality of life and life chances of our customers, enhancing the economy and environment of the local area.
- 1.5 In setting out our commitment to social value through this policy, we aim to deliver additional value through commissioning and procurement and to work with partners so that the benefits will multiply through a collaborative approach.
- 1.6 In addition to this we also generate social value through our core activities as a landlord

2. Social Value Act

- 2.1 There are also legislative and regulatory motivations for measuring social impact. The Public Services (Social Value) Act 2012 requires those commissioning or procuring public services contracts to consider how the work can improve the wellbeing of the area. This policy will ensure that Salix Homes and our partners comply with the legislation.
- 2.1 In addition, the HCA's Regulatory Framework for Social Housing in England from April 2012 states 'Boards must maintain a robust assessment of the performance of all their assets and resources (including for example financial, social and environmental returns)'³ providing clear direction towards social impact measurement.

3. Purpose

- 3.1 This policy puts customers at the heart of what we do. This means ensuring that for every pound of money Salix Homes spends, as much value as possible must be achieved for local people and our communities.
- 3.2 Its purpose is to ensure that social value principles are applied in a way that enables us to maximise economic, social, and environmental wellbeing for our customers and communities.

- 3.3 We will measure the social value we create to ensure that we are aware of the impact of our activities; that we are providing value for money; that we are allocating resources effectively; that we are listening to the needs of local people; and that we are able to demonstrate the value of a social housing tenancy.

This will be done in four key principles:

- Through the services we provide for our customers and communities
- Through involving customers in our procurement process
- Through local partnership working
- Through measuring the social value of a tenancy

4. What is Social Value?

- 4.1 Social value is the measurement of the positive changes people experience that benefit the community.
- 4.2 It can be described as the 'broader value' that is created for society by considering a wide range of impacts that our decisions can influence, not just the financial implications. By considering social value in the decisions, we take as a business, including the way we operate, employ staff, engage with communities, and procure products and services, we can cultivate a more sustainable, resilient, and inclusive society.
- 4.3 Social value is the long-term, sustainable improvement for society that can be gained by promoting positive social, economic, and environmental wellbeing.

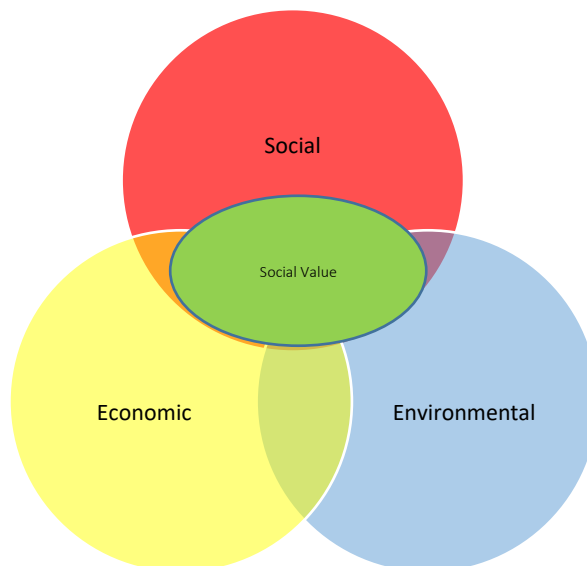


Figure 1 Social Value

5. Social Value of a Tenancy

5.1 Salix Homes' mission is to support our communities to 'Live, Grow and Thrive Together'. As a provider of social housing, Salix creates impact through three main focus areas:

- Providing affordable homes
- Building and regeneration
- Providing modern landlord services

Salix is first and foremost a successful business but one with the welfare of its residents firmly at its heart. Tenancy success is a goal shared by Salix as a landlord and its tenants, and the benefits work both ways.

5.2 Combined with our focus on customer service and engagement, Salix will seek to improve the life chances of our residents and create tangible social value. A social tenancy helps people to thrive in many ways, extending beyond just a roof over their head.

5.3 By providing a social tenancy Salix are bringing value to the lives of people who may otherwise have been living in temporary, unsuitable or overcrowded accommodation, and by repairing and maintaining the homes and communal green spaces around our customers homes we are bringing value to the local community as a whole.

5.4 Through this policy we will highlight the holistic value of a social tenancy by assigning a value to the positive impact a Salix Homes property can have on a person's life and the wider community.

6. 4 key pillars of social value

6.1 Social value definition considers four primary types of social value: community, sustainability, wellbeing, and diversity and inclusion.

Community

As a socially valuable organisation, we will continue to improve real lives and play a part in creating resilient, aspirational communities. In practice, giving back to the local community means understanding and undertaking activities and initiatives to address their needs.

Sustainability

When considering social value, it's impossible to do so without acknowledging the influence we have as housing providers on the wider environment. By becoming more aware of the influence we have and taking the right steps to improve our wider impact we will develop our approach to 'sustainable thinking'.

Wellbeing

In a lot of ways, all roads lead back to wellbeing when it comes to social value. We will continue to identify ways to improve social inequality ensuring happier and healthier lives for future generations and bolster local communities to improve our customers wellbeing. This is embedded within our Wellbeing Strategy.

Equality Diversity and Inclusion (EDI)

Challenging times lie ahead for equality, diversity and inclusion (EDI) practice within Salix Homes and the wider social housing sector. It is no longer enough for a housing association to commit to EDI because of legislative requirements, or because it is morally the ‘right thing to do’. In the current climate, where for many associations funding decisions are becoming increasingly difficult, there is an increasing requirement to be able to evidence the impact of such activities.

Since the introduction of the Social Value Act 2012 there has been greater emphasis on wider social, environmental and economic impacts an organisation’s activities can have. As organisations that exist not just for profit, but to bring wider benefits to society, the prominence of the national social value agenda is very much in keeping with Salix Homes’ ethos as a place-based anchor organisation in Central Salford.

EDI is therefore one of the most important aspects of social value for Salix Homes which we can positively influence through our activities including:

- Maximising the social value, we can bring through our investment and service delivery activities.
- Ensuring our services are easily accessible to all sections of our communities.
- Ensuring we listen to the customer voice.
- Ensuring that customers are treated fairly and with respect.
- Ensuring customers are given every opportunity to influence how we deliver services through our engagement framework.
- Advancing equality of opportunity for all, in our role as a housing provider and employer.

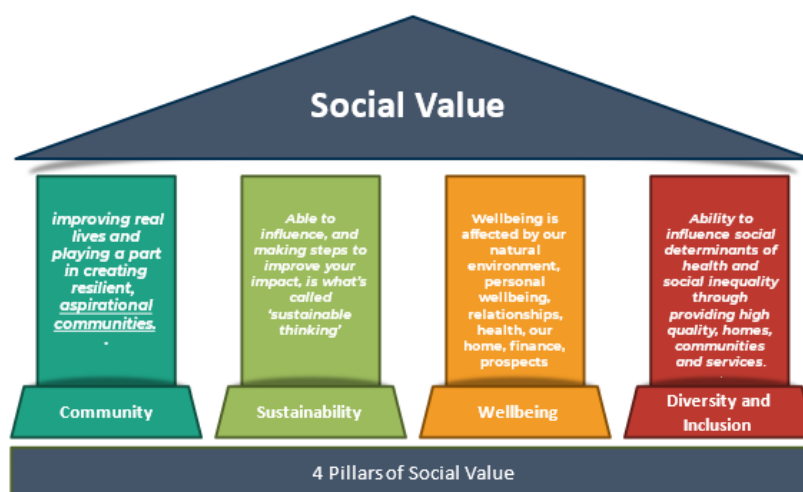


Figure 2 Social Value Pillars

7. Priorities

7.1 Our social value priorities align with our corporate priorities and the themes within our Wellbeing Strategy.

Priority 1 - Community

- Increasing feelings of safety at home and out in the community
- Opportunities for volunteering and fundraising
- Supporting communities to deliver activities they consider important
- Co-designing priorities for investment and improvement with communities
- Support to gain employment opportunities that are paid, offer job security and progression
- Support to gain skills and qualifications to improve access to employment or enhance career prospects
- Support to reduce poverty including fuel and food poverty
- Removing barriers to work and offering pre-employment support
- Creating apprenticeships and training programmes, targeting our tenants and customers
- Delivering quality work placements through our Kickstart programme and supporting volunteer work placements and work experience
- Working with schools and colleges to fulfil our obligations as a business enterprise advisor
- Supporting staff community volunteering days

Priority 2 - Sustainability

- Access to affordable homes
- Develop and commence delivery of the older persons housing offer
- Increase the number of affordable homes
- Increase use of local supply chain
- Providing well maintained homes
- Helping local people and residents to secure and sustain their tenancies

Priority 3 - Wellbeing

- Supporting people to be mentally and physically active
- Supporting people to live independently as long as they can and want to
- Ensuring access to well-maintained green spaces
- Developing people centred approaches to service delivery
- Work with partner agencies to address loneliness and social isolation
- Increasing awareness and access to healthy eating
- Implementing an employee programme and creating community-based volunteering initiatives for staff that benefit local people
- Encouraging positive wellbeing and access to mental health and mindfulness resources
- Working with partners to increase access to recreational, sport and leisure activities

Priority 4 - Diversity & Inclusion

- Developing people centred approaches to service delivery
- Developing a fully inclusive customer engagement framework
- Working with partner agencies to offer welfare and benefits advice to help residents secure their entitlements

- Developing and implementing our Equalities, Diversity, and Inclusion strategy
- Seeking to improve parity of opportunity and ensuring our workforce and governance is representative and reflective of the communities we serve
- Offering opportunities to customers to digitally upskill, train and improve their connectivity and working in partnership to provide access to affordable digital solutions
- Supporting affordable warmth and reducing fuel poverty
- Providing access to low-cost furniture and essential household equipment

8. How will we develop our approach to Social Value?

- 8.1 We will develop our approach to social value by:
- Developing an internal Social Value Group
 - Developing new customer Procurement Panel
 - Recruitment of a new Procurement team
 - Ensuring social value is captured at procurement stage and then delivered through contract management.
 - Utilising the 'HACT' social value tool, which will assist us to measure the value of our social impact
 - Producing a social impact statement annually.
 - Striving to continually improve services and local facilities by offering support to local organisations and building and/or strengthening partnerships
 - Embedding Social Value across the organisation
 - Benchmarking our own social value against partner organisations
 - Utilising external funding opportunities to maximise Salix £1
 - Measuring the social value of a Salix Homes Tenancy
 - Utilising our Customer Connectors to lead on where and how we spend our community funding based on local priorities and need
 - Ensuring we have a blended approach to quantitative and qualitative data, real live case studies of how our social value has improved customers lives.
 - We are a member of the Greater Manchester Housing Providers (GMHP) who are committed to increase the social value that we collectively generate throughout our work.

9. Social Value in Procurement

- 9.1 The objectives, priorities and principles set out in this policy equally apply to procurement decisions. However, procurement decisions must also:
- Meet the obligations of the Public Services (Social Value) Act 2012, which mandates consideration of Social Value when procuring contracts above certain threshold values
 - Comply with all relevant laws governing public procurement, including those relating to competition and public subsidy/state aid
 - Respond to central government policy
- 9.2 Good Contract Management

Contract management enables both us and our suppliers to meet our contractual obligations at an agreed cost and quality, while good contract management helps to maximise savings and service quality.

We will keep a records of what additional social value is being achieved. Where suppliers are found not to be fulfilling their social value obligations as stated in the contract requirements, appropriate action will be taken.

9.3 Value for Money

Consistent application of effective procurement practice, that achieves and demonstrates value for money, across the organisation; and ensures we comply with the Financial Regulations, legislative requirements, and best practice.

10. How we will measure social value

10.1 At strategic level, the effective use of social value will contribute towards the outcome measurements detailed in our corporate plan.

As we become more experienced in our use of social value, we will.

- Highlight the holistic value of a social tenancy by assigning a value to the positive impact a Salix Homes property can have on a person's life and the wider community.
- Maximise the benefits of the HACT social value measuring tool to measure the benefits that our services and programmes bring to our customers and communities.
- Build a database that details the social value outputs we have captured at the procurement or contract management stage of the procurement cycle. This will be regularly distributed both internally and externally to ensure that social value outputs are utilised to their maximum potential.
- Have a blended approach which consists of not only quantitative data but also qualitative data. This will be done by building a suite of case studies to practically demonstrate a range of approaches and outputs we have achieved through the use of social value.
- Ensure that the monitoring and evaluation of social value is built into the contract management of the service, and where appropriate financial or commercial penalties will be associated with these.
- Salix Homes Contract Manager will continuously monitor what contracts deliver on social value, ensuring outputs agreed at start of each contract are delivered.
- Ensure the measurement, monitoring and evaluation of social investment is overseen by the Community Engagement Manager in the organisation in conjunction with the Social Value Group

10.2 Although there are several existing models to help calculate social value, we have opted to utilise the Housing Association Charitable Trust (HACT) model as we feel this is the most appropriate tool for measuring social value in housing and is used successfully across the sector.

- 10.3 HACT have developed a new bank of values related to social investment in communities, The 'Social Value Bank'.
- 10.4 The HACT Social Value Bank, value calculator contains values around Employment, Local Environment, Health, Financial Inclusion and Youth.
- 10.5 We will use the HACT Social Value Bank, calculator in conjunction with HACT Community Insight tool, which will give us the data and analysis we need to ensure our services are underpinned by the best possible knowledge of local communities.

11. How we will report on social value

- 11.1 An annual Social Impact statement will be prepared and published to demonstrate the difference that we have made as a result of our Social Value approach to doing business.
- 11.2 We will continue to work within the HACT social value framework, once our Social Value statement has been produced HACT will offer a Certification Process where our statement will be assessed and validated to say we have followed the rules of application.