

Updated Social Value Policy and Framework Action Plan

Objective: To build on our social value foundation by incorporating innovative systems and tried-and-tested practices from organisations with successful social value models to maximise the opportunities of creating positive outcomes for the planet, places, and people of Barnet through our supply chain.

Refreshing the policy will better align social value with Our Plan for Barnet and our Sustainability Strategy, Sustainable Commercial Strategy and Reducing Poverty and Community Wealth Building Strategy.

Timeline:

Item	Deadlines
Update TOMs	31 August 2023
Develop SV Matrix and monitoring tools	31 August 2023
Update Social Value Policy	8 September 2023
Leaders Cabinet Briefing	19 September 2023
Final cleared report	9 October 2023
Cabinet meeting	18 October 2023
Start of Implementation	27 October 2023
Social Value Report shared with CMT	26 April 2024
Cleared Social Value Report shared with Cabinet	2 May 2024

Responsible Parties:

Name	Job Title	Role
Lwazi Ngubane	Social Investment Officer	Lead officer for Social Value
Liz Cowie	Assistant Director Strategy, Communications & Engagement	Lead officer for Reducing Poverty and Community Wealth Building
Tim Campbell	Interim Assistant Director (Commercial and Procurement)	Procurement Lead
Susan Lowe	Senior Business Partner	Procurement Specialist
Oli Pinch	Business Engagement Manager	Lead officer for Business Engagement
Ellen Jennings	Senior Workstream Coordinator - Sustainability	Sustainability contact for Social Value initiatives
John Bryson	Welfare, Employment and Skills Programme Manager	Lead officer for Employment and Skills
Barry May	Assistant Director, Resident Experience & Digital	Lead officer for Digital Inclusion

STEP-BY-STEP PROCESS

Step 1: Establish a cross-functional team.

Objective: Assemble a team representing various service areas to oversee the policy and framework update.

The Social Value Task Group (SVTG), a pan-council group comprising of 26 representatives from various service areas, developed the existing policy and will be heavily involved in refreshing this policy and framework.

Step 2: Review existing policy and assess corporate objectives.

Objective: Assess the current social value policy and framework to identify areas that need to be updated or improved.

Tasks:

- Review the existing policy and framework.
 - Identify its strengths and weaknesses.
 - Identify areas that are not in-line with our new corporate objectives and strategies.
 - Document areas requiring updates.
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Step 3: Stakeholder engagement.

Objective: Gather input and insights from internal and external stakeholders to inform the policy update.

Tasks:

- Schedule individual meetings and focus group sessions with key internal and external stakeholders to inform the policy. Internally will be SVTG members and externally will be peers from other local authorities and housing associations.
 - Analyse feedback and identify key priorities.
 - Attend Social Value network meetings and conferences to become more informed on the best practices and challenges other organisations face.
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Step 4: Define updated objectives.

Objective: Establish clear objectives for the updated policy and framework.

Tasks:

- Incorporate stakeholder feedback into defining objectives.
 - Ensure objectives address the shortcomings of the current policy.
 - Set specific, measurable, achievable, relevant, and time-bound (SMART) goals.
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Step 5: Policy and TOMs modification.

Objective: Modify the social value policy and TOMs based on the defined objectives and stakeholder input.

Tasks:

- Draft the updated social value policy including new strategic additions and changes.
 - Update TOMs to align with corporate themes, objectives and priorities.
 - Ensure alignment with current regulations and standards.
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Step 6: Develop measuring and reporting mechanisms, and the Social Value Matrix.

Objective: Establish measurement methods, and tools to monitor outcomes and impact of social value.

Tasks:

- Identify relevant social, economic, and environmental metrics (National TOMs).
 - Develop monitoring tools and a reporting process.
 - Develop Social Value Matrix to capture crucial granular details in tenders such a quantities, milestones, responsible persons, and method statement.
 - Determine the frequency of data collection and reporting.
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Step 7: Approval and Adoption

Objective: Gain formal approval from the council leaders and officially adopt the updated policy and framework.

Tasks:

- Present the final draft of the refreshed policy and framework, along with requisite papers, to CMT and Cabinet.
 - Policy and framework must go through clearance between CMT and Cabinet meetings.
 - Consultation with external stakeholders such as residents and local businesses may be required.
 - Develop a communication plan for internal and external stakeholders to announce the adoption.
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Step 8: Implementation

Objective: Implement the updated policy and framework across the organisation.

Tasks:

- Provide training and guidance to existing and new contract managers to ensure everyone understands the framework.
 - Establish monitoring and reporting expectations.
 - Start developing Social Value e-learning for colleagues across the council.
 - Publicise the resources – TOMs, Updated Toolkit.
 - Allocate resources and budgets as needed for implementation – procurement will provide funds.
 - Monitor progress and make adjustments as necessary.
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Step 9: Evaluation and Continuous Improvement

Objective: Continuously assess the effectiveness of the updated policy and framework and make improvements as needed.

Tasks:

- Regularly evaluate the effectiveness of social value framework and if it is achieving its purpose.
 - During the implementation stage, evaluate monthly. Once framework is fully functional, evaluate annually.
 - Solicit ongoing feedback from stakeholders - mainly businesses in the supply chain or those that have bid for contracts.
 - Make adjustments and enhancements based on data and insights.
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Step 10: Social Value Reporting and Transparency

Objective: Communicate social value progress and outcomes transparently. Social Value Report produced annually.

Tasks:

- As part of the training for contract manager, expectations regarding reporting should be established.
 - The Social Investment Officer must receive bi-annual reports of progress from contract managers.
 - Halfway through and at the end of the fiscal year.
 - Contract manager must request reports from suppliers in-line with the organisation's reporting timeline.
 - Share outcomes with colleagues, stakeholders, and the public on an annual basis – end of fiscal year.
 - Internal colleagues will be informed bi-annually.
 - Celebrate successes – work closely with comms team on campaigns.
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Step 11: Review and Iterate

Objective: Periodically review and iterate on the social value policy and framework to remain responsive to changing needs and challenges.

Tasks:

- Schedule annual reviews of the policy and framework.
 - Consider emerging social, environmental, and economic trends and adjust approach accordingly.
 - In particular TOMs as they should always reflect our priorities at a given time.
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Step 12: Prepare for the next reporting period.

Objective: Ensure all tasks at the end of the fiscal year are completed, documents are stored for future reference and a new monitoring worksheet is prepared.

Tasks:

- Social Value Report produced at the end of the fiscal year as aforementioned.
 - Shared with colleagues, external stakeholders and publicly.
- Archive all relevant documents, feedback, and reports.
- Produce a new SV monitoring worksheet which should be clear of data.
- Identify suppliers that are struggling with their commitments and provide support to contract manager to ensure progress is made.