



Public Document Pack STROUD DISTRICT COUNCIL

Council Offices • Ebley Mill • Ebley Wharf • Stroud • GL5 4UB
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17 November 2021

STRATEGY AND RESOURCES COMMITTEE

A meeting of the Strategy and Resources Committee will be held on **THURSDAY, 25 NOVEMBER 2021** in the Council Chamber, Ebley Mill, Ebley Wharf, Stroud at **7.00 pm**

Kathy O'Leary
Chief Executive

Please Note: The meeting is being held in the Council Chamber at Stroud District Council and will be streamed live on the Council's [YouTube Channel](#). A recording of the meeting will be published onto the [Council's website](#). The whole of the meeting will be recorded except where there are confidential or exempt items, which may need to be considered in the absence of press and public.

Due to current Covid-19 regulations a maximum of 6 members of public will be permitted in the Council Chamber at any one time, if you would like to attend this meeting please contact democratic.services@stroud.gov.uk.

AGENDA

1. **APOLOGIES**
To receive apologies of absence.
2. **MINUTES (Pages 3 - 10)**
To approve the Minutes of the meetings held on 30 September 2021.
3. **DECLARATIONS OF INTEREST**
To receive declarations of interest.
4. **PUBLIC QUESTION TIME**
The Chair of the Committee will answer questions from members of the public submitted in accordance with the Council's procedures.

DEADLINE FOR RECEIPT OF QUESTIONS Noon on Friday, 19 November 2021

Questions must be submitted to the Chief Executive, Democratic Services, Ebley Mill, Ebley Wharf, Stroud and can be sent by email to Democratic.services@stroud.gov.uk

5. **FIT FOR THE FUTURE PROGRAMME UPDATE (Verbal Report)**
To receive a verbal update.
6. **PROPERTY UPDATE (Pages 11 - 20)**
To report on property reviews since 2019 and set a timetable for updating the Corporate Asset Management Strategy.
7. **PERFORMANCE MANAGEMENT FRAMEWORK REVIEW (Pages 21 - 34)**
To introduce the Performance Management Framework.
8. **REVISED SOCIAL VALUE POLICY (Pages 35 - 404)**
To approve the revised Social Value Policy.
9. **ECONOMIC DEVELOPMENT STRATEGY (Pages 405 - 432)**
To consider a Draft Economic Development Strategy for the District.
10. **MEMBER / OFFICER REPORTS (TO NOTE)**
 - (a) Performance Monitoring (Pages 433 - 438)
 - (b) Gloucestershire Economic Growth Joint Committee (GEGJC) (To Follow)
 - (c) Gloucestershire Economic Growth Scrutiny Committee (GEGSC) (To Follow)
 - (d) Regeneration and Investment Board (To Follow)
 - (e) Brimscombe Port (Pages 439 - 440)
11. **MEMBER QUESTIONS**
See Agenda Item 4 for deadlines for submission.
12. **WORK PROGRAMME (Pages 441 - 442)**
To consider the work programme.

Members of Strategy and Resources Committee

Councillor Doina Cornell (Chair)

Councillor Chris Brine
Councillor Gordon Craig
Councillor Stephen Davies
Councillor Nicholas Housden
Councillor Nick Hurst
Councillor Martin Percy

Councillor Catherine Braun (Vice-Chair)

Councillor Keith Pearson
Councillor Steve Robinson
Councillor Mattie Ross
Councillor Ken Tucker
Councillor Chloe Turner



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STRATEGY AND RESOURCES COMMITTEE

30 September 2021

7.00 - 9.07 pm

Council Chamber

Minutes

Membership

Councillor Doina Cornell (Chair)

Councillor Chris Brine
Councillor Gordon Craig
Councillor Stephen Davies
Councillor Nicholas Housden
Councillor Martin Percy
Councillor Nick Hurst*

*= Absent

Councillor Catherine Braun (Vice-Chair)

Councillor Keith Pearson
Councillor Steve Robinson
Councillor Mattie Ross
Councillor Ken Tucker
Councillor Chloe Turner

Officers in Attendance

Strategic Director of Resources
Interim Monitoring Officer
Senior Democratic Services & Elections
Officer

Chief Executive
Corporate Policy and Governance
Manager

SRC.024 Apologies

An apology for absence was received from Councillor Hurst.

SRC.025 Declarations of Interest

There were none.

SRC.026 Minutes

RESOLVED That the Minutes of the meetings held on 22 July 2021 were approved as a correct record.

SRC.027 Public Question Time

There were none.

SRC.028 Draft Council Plan

The Chair, Councillor Cornell, presented the report and advised that the Plan had already been considered by Housing, Environment and Community Services & Licensing Committee. The Chair drew the Committees attention to the 3 themes included in the Council Plan:

- Environment & Climate Change
- Community Resilience & Wellbeing
- Economy, Recovery & Regeneration.

The chair advised that the Council Plan was a mix of continuing with significant ongoing projects such as the Canal and new projects, some of which had arisen from the last 18 months of the pandemic.

Councillor Davies advised that the Conservative group hadn't supported the plan at previous committees, not because they disagreed with it, but because they wanted to take some time to consider it. He put forward two key suggestions:

1. That the plan should include annotation or colour coding to show which of the items Stroud District Council would be leading on and which were projects that the Council would be working in partnership with others but would not be leading.
2. That measures and smart objectives should be added to the key objectives to ensure that they have metrics by which they can use over the coming years to check if the Council had achieved it's aims.

The Chair thanked Councillor Davies for his constructive comments and advised the Committee to look at the performance management section of the report which advised that the Key Performance Indicators (KPIs) would be developed with Officers and Members. It was also confirmed that the Council Plan quarterly updates had been added to the Strategy and Resources Committee Work Programme.

Councillor Davies asked for confirmation that Committee Chairs would consider adding an item to their Work Programme to write or review the KPIs to help ensure that the work would be completed. The Chair advised that the service Committee Chairs were present and they would consider the request, it was also advised that the KPIs would be picked up in performance management which was on the Committees Work Programmes.

Councillor Brine agreed that the Council would need to be able to measure progress and that Performance Management needed to change so that Councillors were ensuring that they were looking at what the Council Plan says should be achieved and holding the administration to account. Councillor Braun stated that it would be really good for all Committee Members to work collaboratively to deliver on the Council Plan and that many of the projects would involve partnership work and that in the detailed KPIs further information could be provided on this.

Councillor Davies asked again whether the Council Plan could be annotated to show when Stroud District Council would be taking a lead and asked for a commitment that the KPIs would be brought back to Committee. The Chair advised that they would need to

2021/22

consider Councillor Davies request to see whether that information would be better placed in the KPIs or in the Council Plan.

In response to a question from Councillor Turner it was confirmed that the Youth Council had been consulted on the Council Plan.

Councillor Craig asked whether the wording on Page 28 Section ER5.1 of the Council Plan could be changed to allow for amendments to the Local Plan. The Chief Executive confirmed that the Local Plan had to go through a statutory process and that this would involve recommendations from the inspector which the Environment Committee would then be able to consider prior to recommending to Council. Councillor Craig confirmed that he was satisfied with the assurance provided that the statutory process would be followed.

Councillor Pearson advised that Members of the Public may question how the Council was going to carry out the actions within the Council Plan as that detail had not been provided and he stated that it may not be achievable in the timescale. The Chair advised that some of the objectives in the plan had been started already and were longstanding projects.

Proposed by Councillor Ross and Seconded by Councillor Brine.

Councillor Ross thanked the Corporate Policy and Governance Manager for their work in helping to formulate the plan and advised that it was very different and much more complex than previous Council Plans.

Councillor Davies stated that there were two areas which he felt the plan was light on, young people and skills development. He stated that when it came down to Committee level he would like to make sure that there was a focus on those areas.

Councillor Braun commended the plan and drew Members attention to new projects including the work on retrofit and the retrofit centre for excellence. She stated that Housing Committees decision regarding the Council Owned properties would be a large piece of work over the next 30 years and that she hoped that this would also expand into the private sector.

Councillor Turner acknowledged that the KPIs were fundamental to the Council Plan and that in order to make the metrics meaningful more time was needed and consultation with the Committees before they could be included.

Councillor Percy expressed his enthusiasm for the plan which was well thought out, clear and comprehensive. He also stated that the objective regarding partnerships with the Parish and Town Councils would be a great step forward.

Councillor Pearson asked for confirmation that performance monitoring would be reviewed. The Chair confirmed that a report would be coming back to Committee in November and the Chief Executive advised that they were currently looking at new systems to replace the current system Excelsis.

Councillor Housden advised that he was disappointed that youth services weren't covered more in the plan but stated that there were many other good projects in there.

Councillor Brine in summing up stated that the Council Plan was full of good things for their Communities and that they would only be able to deliver it if everyone worked together and they were challenged if any projects started to go off track.

On being put to the vote, the motion was carried.

RECOMMENDED TO COUNCIL **That the draft Council Plan 2021 – 2026 is adopted.**

SRC.029 Budget Monitoring Report Q1 - 2020/21

The Accountancy Manager presented the report and drew Members attention to the following key points:

- Section 3, Page 30 showed the general fund position with an expected overspend of £587k.
- Appendix D highlighted the Covid Pressures.
- Supported housing – the cost of the placement is higher than can be claimed from the Government.
- ICT – continued pressure– software costs are higher than our budget allocation.
- Additional income from garden waste and for the sale of recyclates.
- Summary of HRA in Section 5, Page 34 showed an expected overspend position of £352k largely due to the backlog of void properties.
- Capital Programme on Page 36 highlighted slippage for the Canal and Cycling and Walking plan.

Councillor Davies asked questions and received answers on the following topics:

- The Covid grants that had been received this year had been included in the table in Appendix D.
- As the landlord for vacant Council owned properties we pay council tax liability to ourselves however much of this was passed to the County Council and Police Authority.
- An additional resource for IT would be considered in budget setting and the Director of Change and Transformation would be involved to ensure that they had an understanding of the resources needed. The Chair advised that an update would be added to the work programme so that this could be looked at in more detail.

Councillor Robinson asked whether the electric charging points identified in paragraph 7.3 would be rolled out to market towns. Councillor Turner advised that she had requested a briefing from the Commissioner at the County Council for Councillors in the Stroud District on progress being made with electric charging points.

Councillor Pearson asked for clarification on the table on Page 45 as he did not think that the totals had been calculated correctly. The Accountancy Manager advised that the total variance was correct however she would look at the other figures in the table to check for errors.

Proposed by Councillor Turner and Seconded by Councillor Braun.

On being put to the vote, the motion was carried unanimously.

- RESOLVED**
- a) **To note the outturn forecast for the General Fund Revenue budget.**
 - b) **To note the outturn forecast for the Housing Revenue Account**
 - c) **To note the outturn forecast for the Capital Programme.**

SRC.030 Budget Strategy

The Strategic Director of Resources introduced the Budget Strategy and highlighted the following sections:

- Local Government funding – they were currently waiting for the Government spending review results.
- New Homes Bonus – the grant had declined for many years and was expected to decrease further to £218k in 2022/23.
- Business Rates – the planned ‘reset’ would have a big impact on the Stroud District.
- Business rates collected by renewable energy facilities had been separated out in Appendix A,
- Council Tax – A slight reduction in the numbers of people claiming Council Tax Support over the last few months. The final budget proposals to Council will include a recommendation to increase Council Tax by the referendum limit which is expected to be £5
- A number of cost pressures around inflation, pressures on contracts including the utilities contract which expires next year.
- Longer term budget adjustments in Paragraph 3.2
- Financial resilience
- Housing Revenue Account (HRA)

Councillor Turner asked whether there were any other income sources the Council could look at in terms of the HRA aside from rent and service charges. The Accountancy Manager advised that options were limited as it had to directly relate to being a landlord.

Councillor Davies asked whether there was anything they could do to maximise the rates from renewable energy facilities. The Strategic Director of Resources advised that he had separated it out in the report to make it clearer and that he would like the Council to do more.

In response to a further question from Councillor Davies regarding wage inflation the Strategic Director of Resources advised that the local government pay award had not yet been agreed and that in the future they would look to assume a 2.5% increase. Furthermore, he confirmed that there were a large number of vacancies and that Local Authorities didn’t always compete on salaries and therefore they may need to consider increasing wages for some roles.

Councillor Tucker asked whether they would be reviewing the investment portfolios. The Strategic Director of Resources advised that the treasury management strategy is reviewed annually and that the portfolio was under constant review. He also confirmed that some of the fund managers would be invited to present at a Members Briefing.

Proposed by Councillor Robinson and Seconded by Councillor Percy.

Councillor Percy commended the report and the hard work that had gone into the estimates despite the large number of uncertainties.

On being put to the vote the motion was carried.

- RESOLVED**
- a) Approve the Budget Strategy 2021/22 to 2025/26 as set out in this report and appendices**
 - b) Continue with the Business Rates pooling agreement, until such time as the Section151 Officer may determine.**

SRC.031 Leadership Gloucestershire Update

The Chair advised that a briefing note had been produced and would be circulated following the meeting.

Councillor Turner asked whether the climate change group would have budget for delivering projects. The Chief Executive advised that it was likely any budgetary requirements would be taken back to the equivalent of the Gloucestershire Economic Growth Joint Committee for consideration.

SRC.032 Gloucestershire Economic Growth Joint Committee (GEGJC)

The report was circulated prior to Committee. There were no questions.

SRC.033 Gloucestershire Economic Growth Scrutiny Committee (GEGSC)

The report was circulated prior to Committee. There were no questions.

SRC.034 Regeneration and Investment Board

The Chair advised that the meeting had been postponed and provided an update on the Levelling Up Taskforce which had met for the first time. The Levelling Up Taskforce would be looking to develop a bid to the Government's Levelling Up Fund which will focus on the enhancement of Stroud Town Centre's Wallbridge area, the railway station and Cheapside. Progress would be reported via the Regeneration and Investment Board to the Committee.

Further information was provided regarding the Canal Project and the public consultation event that had been held at Stonehouse Court Hotel, the Chair advised Members to look at the Cotswold Connected website for further details on timelines.

A briefing session had been held for Members regarding the bid for the fusion power plant. They were hoping to hear soon to see if it had been shortlisted.

SRC.035 Brimscombe Port Update

The chair outlined further developments since the briefing note had been published including:

- All 3 tenants had vacated the Brimscombe Port site and Stroud District Council had instructed One Legal to cease all legal proceedings
- The Council had not been invoicing RUSH or Grace Network for their rent and service charges since the end of their leases. The Group Leaders had been consulted and it had been agreed that no rent or service charges will be sought from RUSH or Grace Network covering the period from the end of their lease to them vacating the site.
- The marketing for developers was due to go live and Members were encouraged to watch the video which had been published.

Good progress had been made around community engagement and all residents would receive a leaflet.

SRC.036 Water Source Heat Pumps

The report was circulated prior to Committee.

SRC.037 Member Questions

There were none.

SRC.038 Work Programme

Council Davies asked whether an update on the Climate Change objectives could be brought to Strategy and Resources Committee. The Chair confirmed that there may be potential to look at specific topics at Strategy and Resources Committee.

RESOLVED To note the updates to the Work Programme.

The meeting closed at 9.07 pm

Chair

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STROUD DISTRICT COUNCIL
STRATEGY AND RESOURCES COMMITTEE
THURSDAY, 25 NOVEMBER 2021

Report Title	PROPERTY UPDATE			
Purpose of Report	To report on property reviews since 2019 and set a timetable for updating the Corporate Asset Management Strategy.			
Decision(s)	Strategy & Resources Committee RESOLVES: that the current Corporate Asset Management Strategy is carried forward and reviewed in 2022.			
Consultation and Feedback	Discussions have been held between officers and the Chair and Vice Chair of Strategy & Resources Committee			
Report Author	Jill Fallows, Property Manager Tel: 01453 754433 Email: jill.fallows@stroud.gov.uk			
Options				
Background Papers	None			
Appendices	Appendix 1 - Property Review Update Appendix 2 - Examples of SDC Assets			
Implications (further details at the end of the report)	Financial	Legal	Equality	Environmental
	Yes	Yes	No	Yes

1. INTRODUCTION / BACKGROUND

1.1 The Council's Corporate Asset Management Strategy 2016-2021 (CAMS) is a key corporate document which explains how the Council manages its property assets to achieve its corporate objectives. see the Council's website:

<https://www.stroud.gov.uk/media/520038/corporate-asset-management-strategy-2016-2021.pdf>

There are separate action plans for General Fund and HRA properties.

1.2 The Council owns many different types of land and buildings, referred to as property assets which are located across the district. As at 31st March 2021 the Housing Revenue Account held 4,992 general houses and flats, including 38 shared ownership homes and 722 independent living dwellings. There are 172 leasehold flats, 633 garages, 12 retail shops and various play areas and open spaces. Property used directly for council services include Ebley

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Mill, The Pulse, SPLC and Gossington Depot. Non-operational property is held for economic development or to raise income e.g. Brunel Mall, the Old Town Hall, Brimscombe Port, Littlecombe, 32 car parks and 10 public conveniences. Finally, there are Community and Heritage Assets such as Woodchester Mansion, the Paganhill Arch and woodlands, and open spaces such as Cockshoot Wood and Cam Peak and Long Down. The plan at Appendix 2 to this report shows examples of some of the Council's assets.

- 1.3 The property portfolio is published as a requirement of the Local Government Transparency Code and can be found on the Council's website at <https://www.stroud.gov.uk/council-and-democracy/opendata/registers/council-property-register>. An electronic property map will be made available to members to enable them to see Council owned properties.
- 1.4 The Strategy follows best practice and requires the Council to challenge the use and performance of its property assets by regular review, enabling it to identify and dispose of assets it no longer needs to raise capital to support its remaining properties and/or reduce costs.
- 1.5 The last report to Committee in June 2019 set a programme of property reviews with the Old Town Hall, Woodchester Mansion and Public conveniences being identified as high priorities. Appendix 1 shows the current position. Covid 19 has significantly delayed the review of the public conveniences until 2022 and the proposed asset transfer to Kingshill House Trust which has, in part, also been due to changes on the Board of Trustees.
- 1.6 Appendix 1 also shows the outcomes of reviews carried out since 2014 with some property assets being retained and some transfers completed. Some community transfers have passed control to an even more local level and reduced costs for example Stroud Subscription Rooms. More transfers are planned with other town and parish councils of amenity land, car parks, playing fields and allotments. Others disposals are raising major capital receipts, for example, the ongoing sales of HRA held garages which are supporting the New Build programme.

2.0 THE CORPORATE ASSET MANAGEMENT STRATEGY

- 2.1 The CAMS should be updated and renewed as property will continue to be held and maintained to deliver the Council's objectives. As the new 5-year Council Plan is now in place, CAMS will be reviewed in 2022 to reflect the key priorities set for the next five years and actions required will be identified.
- 2.2 The drivers for reviewing the Council's property have changed since the current strategy was approved. As well as financial reasons, new considerations such as the 2030 Strategy have emphasised the need to reduce the environmental impact of property assets highlighting the opportunity to work with other partners. An example of this is the One Public Estate - Zero Carbon Public Estate bid. This project aims to explore how the rationalisation, co-location and re-use of public property can deliver more sustainable buildings, homes, jobs and aim for a net zero carbon future. The Old Town Hall is part of this bid.

- 2.3 Environment and climate change is a priority in the Council Plan, and a strategic objective is to protect and enhance biodiversity. This will be a driver for reviewing the Council's woodlands and green spaces.
- 2.4 Post pandemic economic recovery is a priority as well as developing key regeneration and brownfield sites. The updated CAMS will also align with the Economic Development Strategy which is timetabled for final approval in 2022.
- 2.5 The 2022 CAMS is the opportunity for members to reconsider their priorities and emphasis on property in line with the new Council Plan which can be reflected in the Action Plans which will outline clear and measurable actions that can be implemented and an updated programme of property reviews. It is anticipated that the CAMS will be reported to Strategy & Resources by October 2022 at the latest.

3. RECOMMENDATION

- 3.1 That committee notes the current position on the reviews and approves the review of the Corporate Asset Management Strategy in 2022

4. IMPLICATIONS

4.1 Financial Implications

There are no financial implications arising directly from this report.

Each individual asset review will have financial implications which will be considered at the time of that review.

Graham Bailey, Principal Accountant

Tel: 01453 754133 Email: graham.bailey@stroud.gov.uk

4.2 Legal Implications

There are no legal implications arising directly from this report but legal advice will be provided, as appropriate, in respect of individual asset reviews. Individual disposals will be required to comply with various statutory requirements depending upon the nature and terms of the disposal

One Legal

Tel: 01684 272203 Email: legal.services@onelegal.org.uk

4.3 Equality Implications

There are not any specific changes to service delivery proposed within this decision

4.4 Environmental Implications

There are no significant implications within this category.

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Appendix 1

Property	HRA/GF	Current Position/Outcome	Target Date
The Old Town Hall, Stroud	GF	Is a Grade II* listed building comprising of small office units, a meeting room and stores. It is currently underlet and requires modernisation. The Old Town Hall formed part of the One Public Estate (OPE) bid. Phase 1 of this project will look at a number of sites and properties including the Old Town Hall where it is hoped to identify and implement energy efficiency measures. This will feed into an options appraisal for this asset.	October 2022
Public Conveniences	GF	Identified as a review due to start in 2019/20. The first stage was to have initial discussions with the relevant Parish & Town Councils to assess the local importance of each block. These discussions have taken place. Officers were proposing to install counters in the PC's in late spring/early summer 2020 to get accurate data on the number of people using the facilities before identifying options and making a recommendation to S&R in late 2020 but were unable to progress because of Covid. Discussions with Parish and Town Councils on community assets transfers are ongoing and if opportunities arise they will be progressed (see Cainscross PC's below).	Early 2023
Kingshill House	GF	A financial package to assist a transfer has been agreed which includes a tapering reduction in core funding. Covid had a significant impact on Kingshill House and there have been changes on the board of Trustees. Once the Council has received a robust Business Plan from the Trust and it is confident that the board is in a position to take on the freehold interest final terms will be agreed and reported back to S&R for approval. A Member representative is now on the Board of Trustees.	Lease ends Oct 2024
Surplus Small Sites	HRA	Open market disposal (programme ongoing) 34 sites sold to date achieving capital receipts totalling £650,000	2026 (10 year programme)
Surplus Garages	HRA	Open market disposal (programme ongoing) 120 garages sold to date achieving capital receipts totalling £1.25 million	2026 (10 year programme)
Stroud Cemetery Chapel	GF	Approval to agree terms for a transfer of the cemetery chapel to the Stroud Preservation Trust for £1 was given by Strategy & Resources Committee in October 2020 subject to detailed feasibility studies, public consultation, compliance with S123 and a further report back to S&R. Despite Covid, the Trust has appointed consultants to develop a detailed and technical condition survey along with costings for minimal intervention in the chapel and longer term options. Alongside this Trustees will be doing commercial and community potential user	October 2022

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Appendix 1

		research which will give the Trust a clear idea whether or not they are in a position to take on the chapel as a long term project. Officers will report back to S&R to update on progress.	
Completed Reviews			
Woodchester Mansion	GF	A Grade I listed building of national importance leased on a long term basis to the Woodchester Mansion Trust. Covid had a significant impact on income because the mansion had to close during lockdown but grant funding from Historic England and Historic Houses Foundation grant has enabled the Trust to fund repairs to the east windows and roof. Senior officers are meeting regularly with Trust and working more closely with it in a bid to help the Trust to reach a more financially sustainable position for the long term including research on and links into other potential sources of funding and support. A Member representative is now on the Board of Trustees.	completed
Stratford Park & The Pulse	GF	The Leisure and Wellbeing Strategy 2021-2041 has now been adopted by the Council. Any property implications arising when implementing the actions in the strategy for Stratford Park, the Leisure Centre and The Pulse will be reported back to Strategy & Resources Committee.	Review completed 2021
Cainscross WC's	GF	5 year lease to Cainscross Town Council granted in August 2021	completed
Phase 4 Oldends Lane Industrial Estate	GF	Council's Head lease expired in December 2019, decision made not to renew.	completed
Woodfield Playing Field, Cam	HRA	Community Asset Transfer to Cam Parish Council completed on 15 th May 2019	completed
Elm Road Playing Field, Cashes Green	HRA	Community Asset Transfer to Cainscross Parish Council completed on 29 th May 2019	completed
Stroud Subscription Rooms	GF	Community Asset Transfer to Stroud Town Council completed in March 2019	completed
Land at Fountain Crescent, Wotton-Under-Edge	HRA	Transferred to Fortis - Registered Provider for affordable housing using RTB receipts in 2018	completed

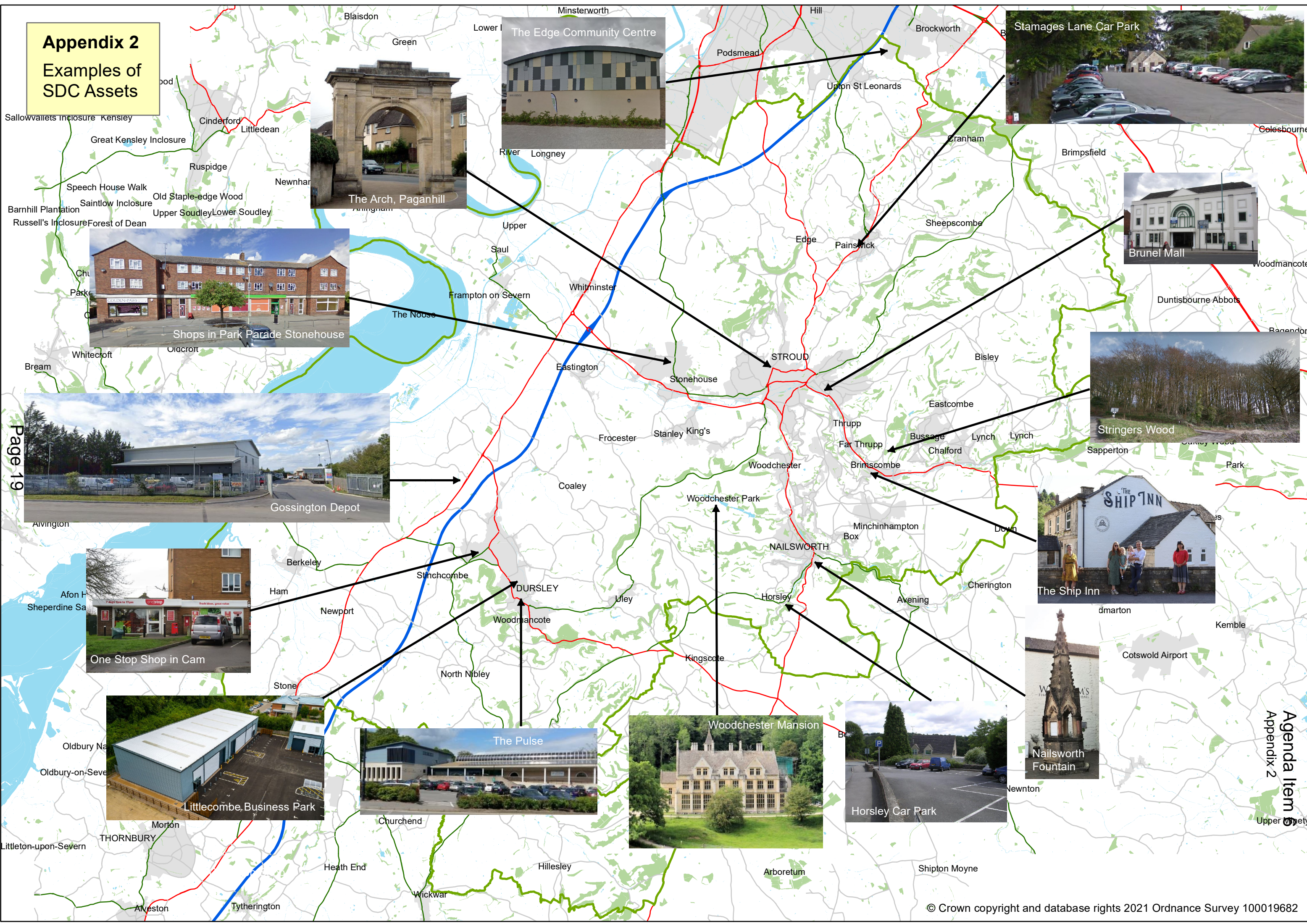
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Appendix 1

Queens Court, Thrupp	HRA	Open market disposal completed in May 2018	completed
Stroud Cemetery, Bank Gardens & Sims Clock	GF	Community Asset Transfer to Stroud Town Council completed in March 2017. The Cemetery Chapel was retained.	completed
Phase 3 Oldends Lane Industrial Estate,	GF	Council's Head lease expired in December 2016, decision made not to renew.	completed
Old Market Precinct, Nailsworth	GF	Reviewed in 2015/16 unable to acquire the leasehold so decision made to retain the ground lease	completed
Brunel Mall	GF	Officer review in 2014 with decision to retain - as at November 2021 all the units are fully let.	completed
Council estate shops	HRA	Officer review in 2014 with decision to retain - as at November 2021 all the estate shops are fully let.	completed

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Appendix 2
Examples of
SDC Assets



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STROUD DISTRICT COUNCIL

STRATEGY AND RESOURCES COMMITTEE

25 NOVEMBER 2021

Report Title	Performance Management Framework Review			
Purpose of Report	To introduce the Performance Management Framework			
Decision(s)	The Committee RESOLVES to approve the Performance Management Framework			
Consultation and Feedback	ALT, SLT and Lead Officers about Performance Indicators			
Report Author	Sarah Turner, Senior Policy and Governance Officer Email: sarah.turner@stroud.gov.uk			
Options				
Background Papers	LGA best practice guidance.			
Appendices	Appendix A – Performance Management Framework			
Implications (further details at the end of the report)	Financial	Legal	Equality	Environmental
	No	Yes	No	No

1. BACKGROUND

- 1.1 SLT agreed in August 2021 that the Council's Performance Management Framework should be reviewed to ensure that is still suitable and in line with current best practice. Part of this agreed review was also to commence the procurement for a new performance management system.
- 1.2 The Council Plan was adopted on 21 October 2021 which sets out the Council's objectives over the term of the plan and includes projects and activities to achieve each of the objectives.

2. MAIN POINTS

- 2.1 The Performance Management Framework (PMF), at Appendix A, has been revised and sets out the principles of performance management across the organisation, the governance framework through which performance will be reported and reviewed, and the various key documents which will ensure that a culture of performance and accountability will be embedded throughout the organisation.
- 2.2 This PMF has been designed to ensure that the Council's priorities are translated into clear plans with performance indicators which can be easily monitored by elected members and support effective implementation by officers.
- 2.3 The PMF is based on the 'Plan – Do – Review – Revise' model of performance management, see section 4 of the attached PMF for details.
- 2.4 The existing use of the Performance Management System, Excelsis, is also being reviewed. The Council has been using this system for over 10 years, and SLT have agreed that we should be reviewing what other systems are available in the market to compare

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with our current system. If a new system is procured members will have access to this, or regular reports will be made available to them.

3. CONCLUSION

By measuring what we are doing we will see progress, challenges, areas needing more emphasis or where priorities need to change. Some performance indicators will be numerical and some will be descriptive.

From high-level strategies down to individual services, this establishes where we are and how we need to progress to achieve the outcomes we want.

This creates a “golden thread” that links individual performance to our Council Plan.

It’s important that we measure how we’re doing because:

- What gets measured gets done;
- If you don’t measure results, you cannot tell success from failure;
- If you cannot see success, you cannot reward it or learn from it;
- If you cannot recognise failure, then you cannot correct it; and
- If you cannot demonstrate results, it makes it that much harder to win public support and drawn down external funding.

4. IMPLICATIONS

4.1 Financial Implications

There are no financial implications arising directly from this report

Graham Bailey, Principal Accountant
Email: graham.bailey@stroud.gov.uk

4.2 Legal Implications

Section 3 of the Local Government Act 1999 requires the council as a best value authority to “make arrangements to secure continuous improvement in the way in which its functions are exercised, having regard to a combination of economy, efficiency and effectiveness”. Monitoring of performance information is an important way in which that obligation is being fulfilled.

One Legal
Tel: 01684 272203 Email: legalservices@onelegal.org.uk

4.3 Equality Implications

There are not any specific changes to service delivery proposed within this decision.

4.4 Environmental Implications

There are no significant implications within this category.



Performance Management Framework

November 2021

Corporate Policy &
Governance

Stroud District Council
Ebley Mill
Stroud
GL5 4UB

Email: customer.services@stroud.gov.uk
Website: <https://www.stroud.gov.uk/>
Telephone: 01453 766321

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Appendix A

Document Responsibility		
Name	Document title	Service
Sarah Turner	Performance Management Framework	Corporate Policy & Governance

Document Version Control			
Date	Version	Issued by	Summary of changes
1 November 2021	Version 1.0	Sarah Turner	Initial document

Policy Review			
Updating frequency	Review date	Person responsible	Service
Annually	November 2022	Policy & Performance Officer	Corporate Policy & Governance

Document Review and Approvals		
Name	Action	Date
Strategy & Resources Committee	To approve the framework	25 November 2021

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Appendix A

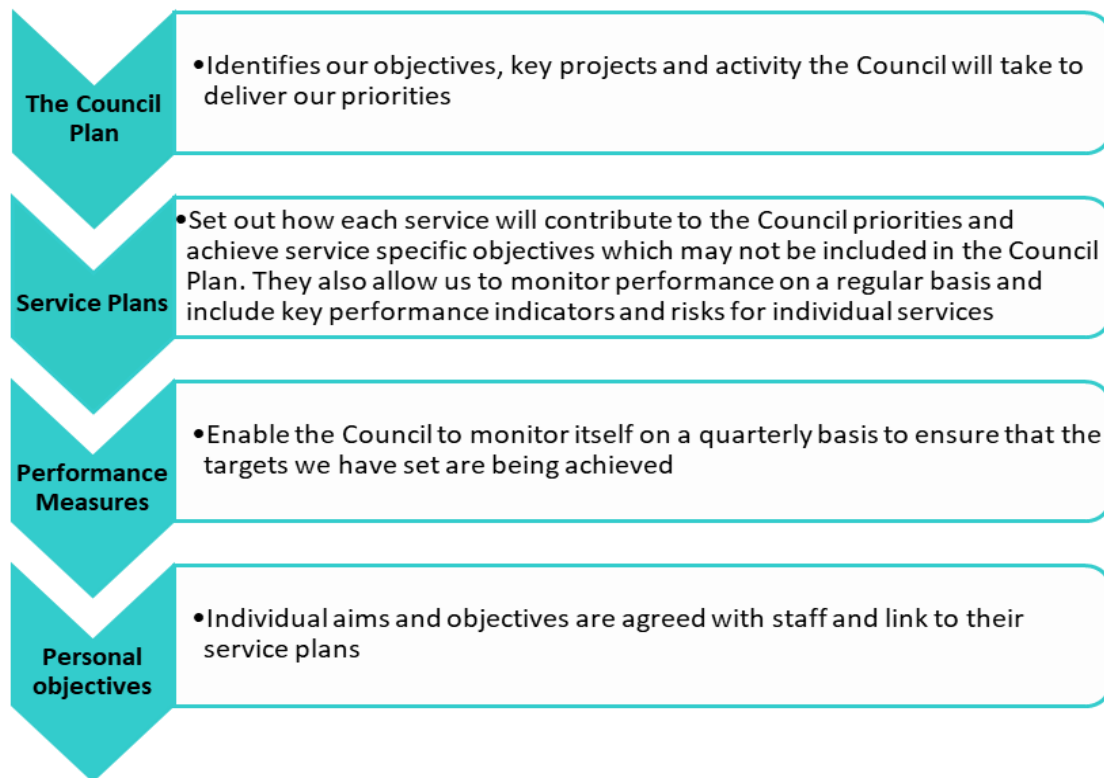
1. Introduction

Managing performance is part of everyday effective management and work practice, and should be integral to all that we do.

- 1.1 Effective performance management plays a central role in putting our communities and residents at the heart of everything. It also enables them to see how well we are doing and how we intend to improve.
- 1.2 Stroud District Council has adopted its Council Plan which identifies priorities which it will focus on until 2026.
- 1.3 The approach set out in this Performance Management Framework (PMF) will support the delivery of the priorities within the Council Plan, improve transparency and assist local people in holding the council to account.
- 1.4 Openness, transparency and accountability is an inherent part of the Council's culture and is fundamental to the achievement of our priorities set out in the Council Plan 2021-26. Moreover, they are essential to effective corporate governance. Therefore, this framework will further strengthen arrangements by enabling our decision making, processes, culture and effective leadership to further focus on the issues that matter to service users and the public.
- 1.5 This PMF has been designed to ensure that the Council's priorities are translated into clear plans with performance indicators which can be easily monitored by elected members and support effective implementation by officers.
- 1.6 The framework also sets out how we intend to measure our work and when we intend to report on this (and to whom).
- 1.7 Through performance indicators that reflect achievable progress, outside observers should understand how the council approaches strategic priorities and change. They will see quarterly reports to councillors that measure progress against priorities and a yearly report that sets out our progress and key achievements.
- 1.8 To officers, the framework should be embedded throughout their individual performance management. Through this, their line managers will be expected to work with them to understand how they as individuals, support the delivery of the council's strategic priority themes. This "golden thread" principle will allow our staff to focus on and prioritise the things that matter most to our residents and communities.

2.0 Performance Management at Stroud District Council

- 2.1 Performance management is a key part of delivering our Council Plan. It is integral to creating a 'golden thread' to all that we do and ensures all our decisions are evidence based. Through clear and accountable performance management the council will ensure its goals and objectives are being consistently met. This document sets out the process by which performance and outcomes are set, monitored and improved.



2.2 The Council Plan

The Council Plan sets out what the Council intends to achieve over the lifespan of the document; it contains 3 distinct priorities, and 16 strategic objectives, as follows:

Environment and Climate Change

- Tackle the Climate and Ecological Emergency
- Biodiversity
- Sustainable Construction and Retrofit
- Mobility / Transport
- Circular Economy
- Renewable Energy

Community Resilience and Wellbeing

- Community Resilience
- Affordable Homes
- Community Engagement
- Leisure and Cultural Services
- Equality, Diversity and Inclusion

Economy, Recovery and Regeneration

- Economic Recovery
- Regeneration
- Investment
- Support for Businesses
- Strategic Planning

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2.4 Service and Team Plans

Services and teams will set their own goals for the year. These will reflect the Council Plan and business as usual functions such as statutory responsibilities. Service plans should contain:

- actions that contribute to achievement of the councils' priorities as identified in the Council Plan.
- actions that are driven by the need to improve efficiency and effectiveness in the service.
- actions that relate to frontline service or delivery of statutory requirements, whether or not directly related to the Council's priorities.
- Identify risks associated with the key actions / projects of the service or team.

3.0 What is Performance Management and why is it important?

3.1 What is Performance Management?

Performance management is the way in which the council ensures that its goals and objectives outlined in the Council Plan are consistently being met in an efficient and effective manner.

This is achieved by the systematic monitoring and evaluation of practice, policies and procedures and user outcomes. Robust monitoring also provides an early indication of any issues allowing priorities to be adjusted and resources moved where needed to ensure that objectives are met.

Corporate Governance

Corporate governance is about doing the right things in the right way. It encompasses accountability and transparency in our actions and decisions.

In developing this framework, the following principles – which are designed to ensure that our processes and arrangements enable robust corporate governance – have been identified:

- **Embedding a strategic approach**

The framework should provide meaningful and accurate performance information and data to the right people at the right time. This will support the monitoring and implementation of the councils' strategic objectives as set out in our Council Plan.

- **Openness and accountability**

Performance management is everyone's responsibility and requires clear lines of accountability to facilitate openness and transparency. Performance information will be shared openly and used to take informed and transparent decisions.

- **Continuous improvement process and learning culture**

This framework should be underpinned by a culture of understanding what went well, what didn't work as planned, and what can be done better.

3.2 Why is it important to have a Performance Management Framework (PMF)?

A PMF allows us to demonstrate that we:

- know what we're aiming for
- know what we have to do to meet our objectives
- know how we're going to measure progress towards meeting our objectives; and
- can detect performance issues early on and remedy them.

It helps the whole Council work in the same direction, to ensure we deliver a real difference on the ground as we all work to meet the communities' needs.

The PMF ensures we deliver what we say we will, makes sure we all remain focussed on our objectives, and helps us identify and address any problem areas.

It's not about highlighting bad performance, but about identifying areas that are not doing as well as they could be so we can understand the reasons why and make improvements early on.

3.3 How will the PMF help us to deliver the Council Plan?

By measuring what we are doing we will see progress, challenges, areas needing more emphasis or where priorities need to change. Some performance indicators will be numerical and some will be descriptive.

From high-level strategies down to individual services, this establishes where we are and how we need to progress to achieve the outcomes we want.

This creates a "golden thread" that links individual performance to our Council Plan.

The PMF with quarterly reports which will be prepared by lead officers identified in the Council Plan and includes an annual strategic review will be a clear way to report on our performance to the public when progress is outlined to S&R Committee.

Why measure progress?

It's important that we measure how we're doing because:

- What gets measured gets done;
- If you don't measure results, you cannot tell success from failure;
- If you cannot see success, you cannot reward it or learn from it;
- If you cannot recognise failure, then you cannot correct it; and
- If you cannot demonstrate results, it makes it that much harder to win public support and drawn down external funding.

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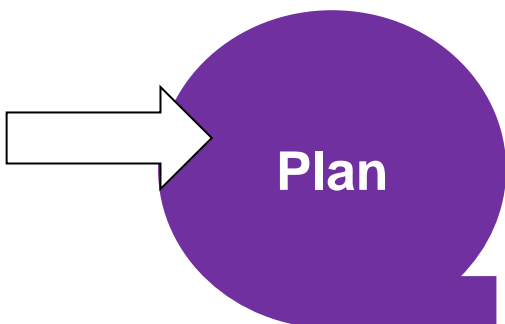
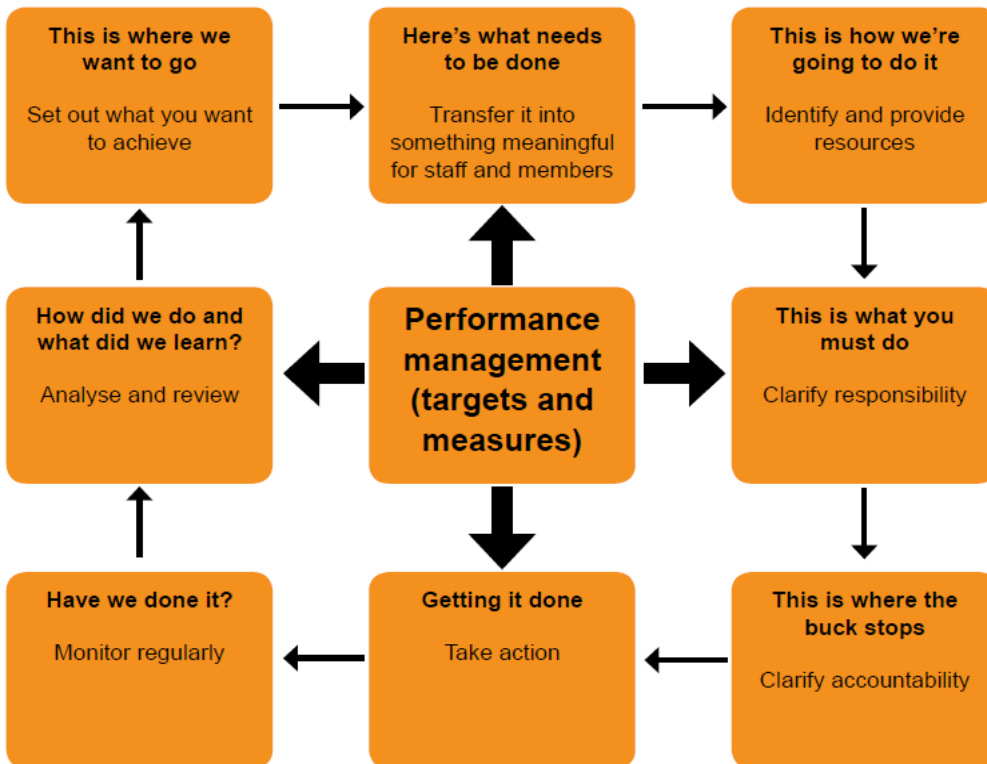
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4.0 Stroud's Model of Performance Management

4.1 It's important that our PMF is embedded across the Council and we are all joined up to achieve our Vision ***“Leading a community that is making Stroud District a better place to live, work and visit for everyone”.***

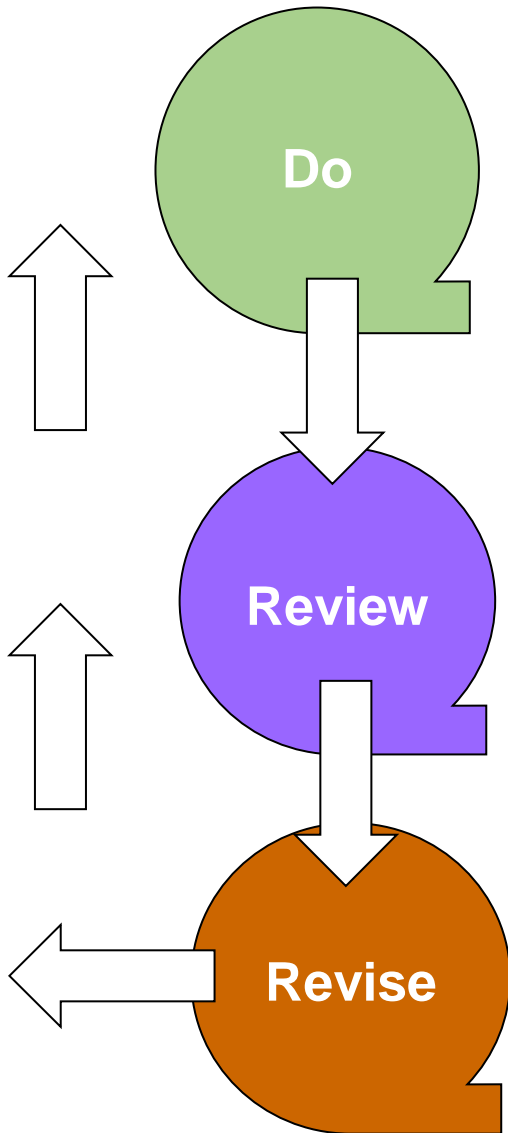
4.2 Our Performance Management Framework is based on the ‘Plan – Do – Review – Revise’ model of performance management.

4.2 The process – plan, do, review and revise



PLAN – The delivery plan sets out the key activities aligned to the priority themes of the the Council Plan.

Services should use this to establish their service plans and include actions related to improving performance, or actions that relate to frontline service or statutory requirements



DO – Deliver services according to plans. Performance management must be in place to support the delivery of the plans and ensure those responsible appropriate action, manage risk, and support people to achieve better performance improvement.

REVIEW – Evaluate performance against objectives.

Regular review meetings need to be held to assess the delivery of plans, the management of known risks and service/employee performance.

REVISE – Update the Council Plan based on performance and on changing circumstances. Use the lessons learned from review to change what is done. Where there is under performance develop recovery plans, where people are under performing understand why and help them to improve, identify new and emerging risks and objectives.

4.2 Setting Performance Indicators (PIs)

A set of key performance indicators have been developed to monitor our progress in implementing the Council Plan priorities. Performance indicators can be either Quantitative (numeric) or Qualitative (narrative based e.g. case studies).

Performance Indicators (PIs) are the tools of performance measurement, used to measure and monitor how well we are progressing towards achieving our goals. Goals can be expressed as **outcomes** (the end result or consequence of an action – tends to take the form of well-being for people) or **outputs** (the amount of something produced – a tangible measure that helps quantify an outcome).

Targets are set for performance indicators stating the level of performance or the outcomes we would ultimately like to achieve. Where possible, all targets should be **'SMART'**. This means that they have the following characteristics:

- **Specific** actions are set out (not vague intentions)
- **Measurable** outputs/outcomes are quantified, so we know when targets are achieved

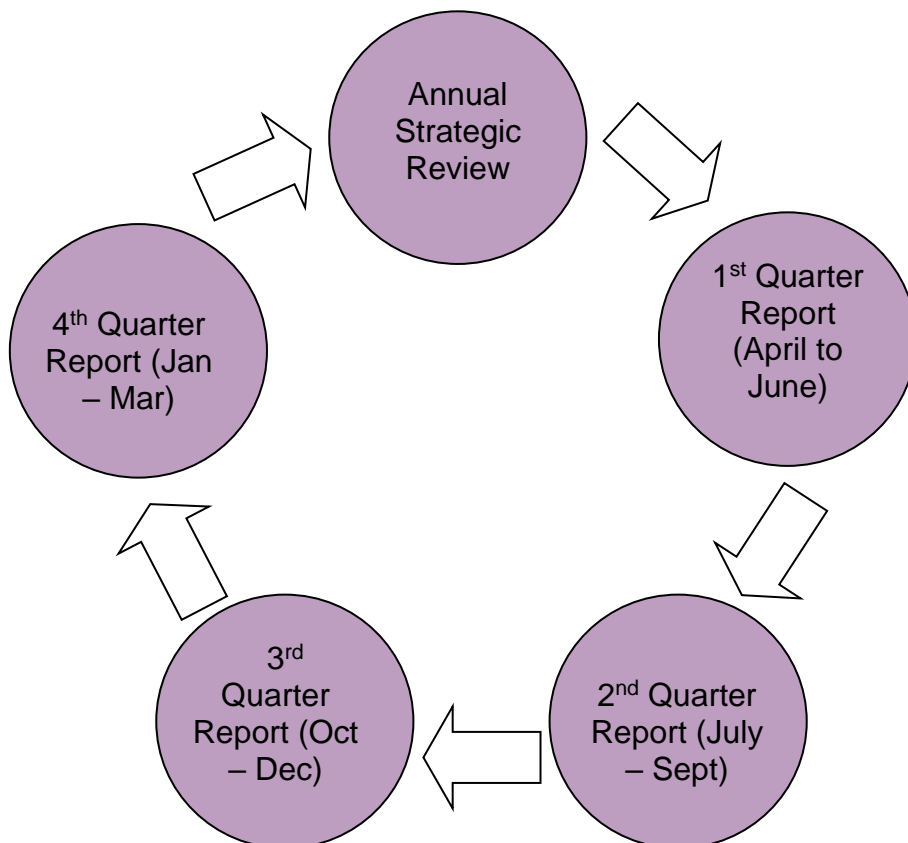
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- **Achievable** through effective project management, with the financial and human resources needed to implement actions being available
- **Relevant** to priorities and aims; and
- **Time-scaled** (clear deadlines and milestones are set)

4.3 Reporting framework

Elected members of each Committee will receive relevant performance reports on a quarterly and annual basis. These reports evaluate the councils' progress in implementing corporate plan priorities. Diagram below illustrates this reporting and monitoring cycle:



4.4 Quarterly Reports

These reports contain detailed data and information on the progress of the Council plan actions and indicators. They also include financial and resource information which can be used to determine resource allocation to support the implementation of priorities. In addition, details of remedial actions required to address a lack of progress or poor performance. This detailed evidence can then be used to revise timescales and activities as appropriate, as well progress reports being published for public scrutiny

4.5 Annual Strategic Review

The annual strategic review will provide an opportunity to reflect on the councils' progress in implementing the Council Plan. It will be used to highlight key achievements and will include case studies to demonstrate positive impact on residents.

The publication will be aimed at elected members, residents, staff and partner organisations.

The report should replicate the design of the Council Plan to demonstrate how they interlink and to provide visible and tangible progress on its implementation.

The annual report will be a key part of developing the delivery plan for the year ahead and allow elected members the opportunity to re-prioritise actions, projects or resources to respond to any changes in the council’s landscape.

5.0 Roles and Responsibilities

Our approach relies on us all to take performance management seriously and ensure the Council makes its plans, policies and decisions based on good quality information. Roles and responsibilities are outlined in the following table:

<p>Chief Executive and Strategic Directors – Senior Leadership Team (individually and/or collectively)</p>	<p>SLT advise members regarding the setting of strategic direction and performance improvement priorities. Strategic Directors set targets and standards for performance, and identify and manage strategic and performance issues and opportunities facing the Council. Strategic Directors receive regular information on performance from Service Managers and consider reports on key strategic performance issues, including achievement against the Council Plan.</p> <p>SLT have responsibility for promoting the integration of performance management into the culture of the Council and for ensuring that performance information used in decision making is ‘fit for purpose’ and reliable.</p>
<p>Leadership and Management Team (LMT) / Heads of Service</p>	<p>LMT / Heads of Service are responsible for the overall operational performance of their service and for the contribution that their service makes to the outcomes and objectives within the Council Plan. They are responsible for contributing to the integration of performance management into their area and for ensuring the quality of all data collected and reported within their areas of responsibility.</p> <p>Where performance targets/standards are not achieved, LMT / Heads of Service are required to explain this and consider what remedial action is required; for corporately monitored performance indicators this is reported in the quarterly monitoring and action reports.</p> <p>LMT / Heads of Service are required to provide assurance on the effectiveness of controls in place to mitigate/reduce poor performance in their service and ensure the involvement of staff in setting relevant and appropriate targets through the annual Service Planning and appraisal process.</p>
<p>Elected members</p>	<p>are ultimately accountable to the electorate for the overall performance of Council services.</p>
<p>Committees</p>	<p>Committees support the PMF by ensuring that plans and policies are coherent and linked to the budget making process. They monitor performance on an ongoing basis and regularly review the Council’s priorities in light of the Council Plan process.</p>

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Committee Performance Monitors	(2 per committee) review and scrutinise the performance of the Council against its objectives, performance indicators, risks and any other measures and targets to monitor the performance of particular service areas and report back to their respective committees.
Audit & Standards Committee	The Audit & Standards Committee monitors the risk management and governance arrangements of the Council to help ensure the effective delivery of services and the achievement of objectives. The Audit & Standards Committee, through the work of Internal Audit, ensure the Council has adequate controls in place. The Committee review and should contribute to the development of the Annual Governance Statement ahead of its formal presentation to the Committee for approval.
Internal Audit	ARA produces the Annual Governance Statement which is approved by the Audit & Standards Committee. They also provide an of audit services, they operate under the statutory requirements of the Accounts and Audit Regulations and relevant Benefits and Council tax legislation. If data quality issues are identified through the course of an audit, whether linked to performance indicator data or not, this will be raised in the audit report. ARA also provide an independent review of the corporate approach to performance management and data quality.
Managers / Supervisors / Team Leaders	All levels of staff with managerial responsibility are responsible for the operational performance of their team and for the two-way communication of corporate initiatives and performance issues. This group of staff are responsible for ensuring their staff have regular appraisals and review the training and skills needed to carry out their roles. They should also ensure that their staff have access to and are familiar with corporate and departmental policies and procedures on performance management and data quality.
Individual staff	All staff have a responsibility to manage their own performance. Each member of staff will be set specific targets as part of their appraisal every year, which staff members will be involved with agreeing.
Policy & Governance	This function supports performance management and data quality within the Council by co-ordinating the corporate approach to performance management and Service Planning. Support and guidance is provided to Strategic Directors and LMT / Heads of Service and other managers and supervisors in delivering the performance management framework, and on elements such as performance indicators, monitoring of achievement against corporate priorities, benchmarking, research. Support is also provided to services in the creation of data processes that support monitoring including advice and guidance regarding the collection and calculation of performance indicators.

STROUD DISTRICT COUNCIL
STRATEGY AND RESOURCES COMMITTEE

25 NOVEMBER 2021

Report Title	REVISED SOCIAL VALUE POLICY			
Purpose of Report	To approve the revised Social Value Policy.			
Decision(s)	The Committee RESOLVES to approve the revised Social Value Policy			
Consultation and Feedback	<ul style="list-style-type: none"> • The Corporate Policy and Governance team, including Procurement. • The Strategic Leadership Team. • The Alliance Leadership Team. 			
Report Author	Hannah Barton, Policy & Projects Officer Tel: Email: hannah.barton@stroud.gov.uk			
Options	N/A			
Background Papers	None.			
Appendices	Appendix A – Social Value Policy Appendix B – National TOMs Framework			
Implications (further details at the end of the report)	Financial	Legal	Equality	Environmental
	Yes	Yes	No	No

1. BACKGROUND

- 1.1** The Public Sector (Social Value) Act 2012 sets out public sector organisations' responsibilities to consider social value in higher value service contracts, or where there is a service element in goods or works contracts.
- 1.2** As a result of the Act, the focus within business processes, bids and tendering activity is no longer solely on financial measurements, and buyers need to consider the wider social impact that has been traditionally made through corporate social responsibility. The Act requires local authorities to consider economic, social and environmental wellbeing in connection with public services contracts with a value that meets the threshold for requiring a full procurement to be carried out in compliance with the Public Contracts Regulations 2015 (currently £189,330).
- 1.3** Previously, Stroud District Council had a Social Value Policy which was an appendix to the Procurement Strategy. This was approved by the Strategy and Resources Committee in June 2019, and provided a brief overview of Social Value at the Council, and the Council's aims in relation to Social Value.

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2. SOCIAL VALUE PORTAL

- 2.1** In August 2021, the Strategic Leadership Team (SLT) agreed to approve the adoption and corporate implementation of the Social Value Portal (SVP) to enable the Council to measure and report on its Social Value activity and to highlight the benefits of this activity to the community. The Corporate Policy and Governance team, with support of officers from other service areas, are currently implementing the Portal and it is anticipated it will be up and running by mid to end of November.
- 2.2** The SVP is an online solution that allows organisations to measure and manage the contribution that their organisation and supply chain makes to the community, according to the principles laid out within the Social Value Act. It allows organisations to report both non-financial and financial data, and measures environmental, social and economic activities delivered through a project in terms that are meaningful to Stroud District residents and businesses.
- 2.3** The SVP uses the National TOMs (Themes, Outcomes and Measures) Framework that was developed in collaboration with the Local Government Association and offers a consistent measurement solution used by public, private and third sector organisations. See Appendix B.
- 2.4** It should be noted that following award of a contract, the Social Value Portal charge a fee to the successful bidder. This is to cover the assessment of bids and ongoing contract management of each project. This is the approach that has been adopted by other local authorities using the Social Value Portal, and we are not aware that any issues have been experienced as a result of this.

3. SOCIAL VALUE MONITORING AND REPORTING

- 3.1** Using the Social Value Portal, the Council will be able to measure and report on Social Value delivered, broken down by project, service area, directorate or Council-wide.
- 3.2** The Social Value Portal will review data on a quarterly basis and report back to contract managers and the Corporate Policy and Governance team. End-of-project reports will also be provided that summarise Social Value delivered and progress against targets. Suppliers can also generate progress reports to share with contract managers, where required.
- 3.3** At the end of each year, the Social Value Portal will provide the Council with an Annual Social Value Report highlighting the total amount of social value the Council has delivered, and its successes. The report will be shared with members, officers and key stakeholders.

4. REVISED SOCIAL VALUE POLICY

- 4.1** A revised Social Value Policy has been written to include more information and to reflect the implementation of the Social Value Portal.
- 4.2** The updated Social Value Policy aligns with the Council's strategic objectives outlined in the Council Plan, in particular the priority regarding Economy, Recovery and Regeneration. It also supports the Council's vision for procurement: 'to demonstrate value for money through effective procurement of goods, services and works on a whole life

basis in terms of generating benefits to the community and the organisation, whilst minimising impacts to the environment.’

- 4.3** Please find the revised Social Value Policy attached at Appendix A. The policy includes sections on background, delivery of Social Value at the Council, and roles and responsibilities for the policy and its implementation.

4. IMPLICATIONS

4.1 Financial Implications

There are no financial implications arising from the adoption of the Social Value Policy.

The Social Value Portal has been procured at a cost of £18,000 for a three year license, along with a £5k cost for an Annual Corporate Social Value Report. This can be met from Covid 19 recovery funds over the three year period.

Andrew Cummings, Strategic Director of Resources
Tel: 01453 754115 Email: andrew.cummings@stroud.gov.uk

4.2 Legal Implications

The Public Services (Social Value) Act 2012 came into force on 31 January 2013. It requires public bodies who commission services to consider how what is proposed to be procured might improve the wider social, economic and environmental well-being of the area. This duty only applies to the procurement of services above the threshold for compliance with the main provisions of the Public Contracts Regulations. This policy exceeds the statutory duty as it is mandatory for all contracts above £75,000 and encouraged for procurements below that level.

The duty is a pre-procurement duty, meaning that before starting the procurement process officers must think about whether what they are sourcing, or the way they are going to source them, could secure these benefits for their area.

The Public Contracts Regulations 2015 permit social aspects to be evaluated as part of the quality criteria. Any social value aspects must be relevant and proportionate to what is being procured.

A contract for services will need to be put in place with the SVP in accordance with the Council’s Contract Procedure Rules.

One Legal
Tel: 01684 272691 Email: legalservices@onelegal.org.uk

4.3 Equality Implications

There are not any specific changes to service delivery proposed within this decision.

4.4 Environmental Implications

There are no significant implications within this category.

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Social Value Policy

October 2021

Corporate Policy &
Governance

DRAFT

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Appendix A

Document Responsibility		
Name	Document title	Service
Hannah Barton, Policy and Projects Officer	Social Value Policy	Corporate Policy and Governance

Document Version Control			
Date	Version	Issued by	Summary of changes
6 September 2021	1.0	Hannah Barton	First version of draft
15 October 2021	1.1	Hannah Barton	Incorporated feedback on procurement wording and roles and responsibilities from Senior Policy and Governance Officer
25 October 2021	1.2	Hannah Barton	Added more detail to delivery and review sections following feedback from Corporate Policy and Governance Manager
15 November 2021	1.3	Hannah Barton	Incorporated feedback from One Legal regarding social value being relevant and proportionate to procurement

Policy Review			
Updating frequency	Review date	Person responsible	Service
3 years unless required earlier	Date document should be reviewed e.g. September 2024	Policy and Projects Officer	Corporate Policy and Governance

Document Review and Approvals		
Name	Action	Date
Name of staff member/committee that has reviewed and/or approved the policy	E.g. consulted, reviewed, approved	Date of review or approval

1 INTRODUCTION

1.1 Purpose and scope

- (a) This Social Value Policy is intended to assist Stroud District Council and its staff and members with measuring Social Value through its commissioning and procurement processes.
- (b) This policy outlines the approach that will be taken in order to ensure that Stroud District Council considers economic, social and environmental wellbeing in connection with its contracts.

1.2 What is Social Value?

Social Value has been defined as the additional benefit to the community from a commissioning/procurement process over and above the direct purchasing of goods, services, works and outcomes. Social Value can be measured in terms of economic, social and environmental activities and outcomes.

Economic outcomes provide contributions to the local economy and economic growth that supports social outcomes. Includes retaining, recirculating and leveraging funds in the local area and a wider contribution to skills, tackling unemployment and maintaining employment.

Social outcomes contribute to a vibrant and healthy community. Includes community-based actions such as local relationships, partnerships and people. Equality, diversity, cohesion and inclusion.

Environmental outcomes relate to protecting, promoting and enhancing the environment. Includes supporting local activities that improve the environment.

2 BACKGROUND

The Council recognises the important role it can play in enabling Social Value through its procurement activity. In 2020/21 we spent approximately £29 million via our procurement activity and through our approach to social value, we will integrate economic, environmental and social sustainability into our procurement processes.

The Public Services (Social Value) Act 2012 came into force in January 2013, cementing the responsibilities of a contracting authority when procuring contracts subject to public procurement regulations to take into account the “economic, social and environmental wellbeing of the relevant area” in its procurement activity.

The Public Services (Social Value) Act 2012 states the authority must consider:

- a) how what is proposed to be procured might improve the economic, social and environmental well-being of the relevant area; and
- b) how, in conducting the process of procurement, it might act with a view to securing that improvement.

Stroud District Council intends to further commit itself to the Act by going beyond the Act’s requirements and implementing this policy into all aspects of its commercial and procurement activity where it is practicable to do so. Used properly, additional social

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value can be beneficial to suppliers and councils, and represent a joint effort to exploit maximum value from procurement.

3 WHY IS STROUD DISTRICT COUNCIL DOING THIS?

In order to really deliver social value and have it fully embedded and considered, buyers must move away from just considering the core contract being delivered by a supplier to one that recognises the overall value of outcomes delivered.

Requiring suppliers to deliver social benefits while they deliver the main element of their contract means that there is a magnified benefit for the Council. Incorporating social value into our commissioning and procurement process can make a tangible difference to people in the community, to service delivery and to the council's spending plans as a whole.

Adoption of this policy can provide the following benefits:

- **Encouraging a diverse base of suppliers:** Promoting supplier diversity; including the participation of small and medium sized enterprises (SMEs) and third sector organisations, and local suppliers in general;
- **Promoting fair employment practices:** Ensuring workforce equality and diversity within supply chains;
- **Meeting targeted recruitment and training needs:** Offering a range of apprenticeship, training and skills development opportunities as well as employment opportunities;
- **Community benefits:** Maximising opportunities for Stroud District organisations to participate in the council's supply chains and encouraging suppliers to make a social contribution to the local area;
- **Ethical sourcing practices:** Ensuring compliance with UK and international standards, promoting fair trade and fair pricing policies, tackling corruption, child labour, animal welfare, blacklisting of union members and similar social issues;
- **Promoting greater environmental sustainability:** Minimising waste and pollution, supporting carbon reduction initiatives, furthering energy efficiency and other sustainability programmes.

This Social Value Policy fully supports the council's corporate priorities in:

- Environment and climate change
- Community resilience and wellbeing
- Economy, recovery and regeneration.

4 DELIVERY

In practice the Social Value Policy will be applied as follows:

- i. As a minimum, all procurements over £75,000 will be required to include social value metrics as a part of the scoring and evaluation process where appropriate. However, wherever possible to do so, procurements below this value should also seek social value benefits from contracts. Social value metrics must be proportionate and relevant to the subject of the procurement.
- ii. The standard weighting for social value will be a minimum 10% of the overall evaluation score and where it is feasible, this may be higher.
- iii. The National Themes, Outcomes and Measures (TOMs) measuring tool as agreed by the Local Government Association will be used to capture social value

- offers from bidders to ensure offers can be evaluated in an open, fair and transparent way.
- iv. Once a procurement exercise is concluded, the responsibility for ensuring the committed social value benefits are actually delivered will fall to those officers responsible for contract management of that individual contract.

4.1 National TOMs Framework

The National TOMs Framework (Appendix A) was developed in collaboration with the Local Government Association and offers a consistent measurement solution used by public, private and third sector organisations. The framework provides a minimum reporting standard for measuring social value and consists of five themes, 20 outcomes and 48 measures.

Stroud District Council’s three strategic priorities are aligned with the themes within the TOMs Framework:

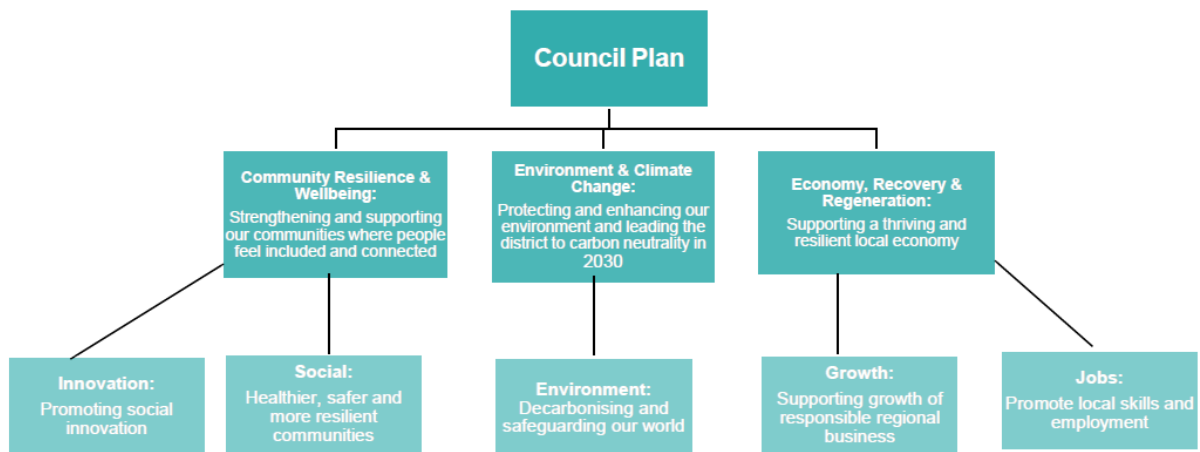


Figure 1: How the Council’s strategic priorities relate to the themes within the TOMs Framework.

Stroud District Council will use the National TOMs Framework to measure and report on Social Value. The TOMs will be reviewed annually to ensure continued alignment with the Council’s priorities.

4.2 Procurement below £75,000

Officers procuring works, goods or services contracts under £75,000 should seek advice and guidance from the Corporate Policy and Governance team on how to seek social value benefits. The National TOMs Framework can be utilised for contracts of any value.

5 REVIEW

Stroud District Council will review its Social Value Policy a minimum of every 3 years, or as required due to changes in legislation. In doing so, it will take account of any changes in legislation pertaining to the Public Services (Social Value Act) 2012, the Local Government Act, UK legislation and any changes to the council’s priorities when it is reviewed.

6 ROLES AND RESPONSIBILITIES

- The corporate performance management framework will enable members through each committee to review progress on contracts and social value outputs which relate to their committee.
- The Corporate Policy and Governance team are responsible for oversight of this policy and its implementation at the Council.
- Any officer responsible for procurement with a contract value of £75,000 or over is responsible for measuring and evaluating Social Value in their contracts as per this policy.

7 RELATED DOCUMENTS

- Procurement Strategy 2019 -2023
- Contract Management Framework
- Performance Management Framework
- Social Value Statement

DRAFT



**Social Value
Portal**



The National TOMs 2021 Framework

for social value measurement

Introduction

The National Themes, Outcomes and Measures (TOMs) Social Value Measurement Framework is open source and free to use on a Creative Commons Commercial licence*.

The framework is designed for organisations that want to embed social value into their procurement or measurement activities, and it provides practical ways to unlock more social value for communities. It has been created with input from more than 120 organisations across sectors, led by the **National Social Value Taskforce**.

This resource aims to create a minimum reporting standard that allows you to compare social value across places and projects and is designed to be used as a starting point for social value measurement. You should combine this measurement standard with your additional interventions and outcomes identified through stakeholder engagement or project specific opportunities.

This proactive tool allows you to mobilise your resources so you can tackle many societal challenges head on. It enables cross sector collaboration and empowers stakeholders within, or outside your organisation.

We encourage procuring authorities and organisations to use the prioritisation tool within the calculator to signpost Measures that you want bidders to focus on. This will incentivise at procurement stage to help you mobilise change.

**For more information on licence details, see [page 359](#).*

Libraries and Plug-Ins

The **National TOMs Framework** includes the following Libraries of Measures:

National TOMs Minimum Reporting Standard Measures (Core) – a core set of sector agnostic Measures selected to be relevant to a wider variety of contract types (now including COVID-19 provisions) 1.

National TOMs Additional Measures – additional Measures that may be relevant for use on particular contracts.

COVID-19 Plug-in Measures – a set of sector agnostic high priority response measures developed to address the challenges created by the current crisis situation.

Real Estate (RE) Plug-in Measures (Core) – a core set of Measures designed around the opportunities for real estate organisations to deliver social value, and that can be relevant both at the planning, construction and operation (in use) stage 2.

Real Estate (RE) Plug-in Additional Measures – Measures that are still aimed at real estate, but are usually targeted to specific stages or groups of stakeholders (e.g. asset managers).

Workplace and Facilities Management (FM) Plug-in Measures (Core) – a core set of Measures designed around the opportunities for facilities management (FM) organisations to deliver social value, and that can be relevant both for workplace and facilities management.

Workplace and Facilities Management (FM) Plug-in Additional Measures – Measures that are still aimed at FM, but are usually targeted to specific aspects or groups of stakeholders.

1. Measures have been included in the different sets based on their applicability rather than how important they are.
2. The Real Estate (RE) and Workplace and Facilities Management (FM) Plug-ins for the TOMs have been developed with contributions from organisations representing the respective sector. They provide the opportunity to engage with the specific needs and priorities that each sector faces around social value measurement and management.

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Plug-In Measurement Framework

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Free online Portal to calculate your measures

You can now register for a free account on the cloud-based Social Value Portal to access the National TOMs Framework and use the calculator. Visit the Social Value Portal – www.socialvalueportal.com to create your account now.

This framework document should be used in conjunction with the online portal.

Please contact info@socialvalueportal.com if you'd like to understand the full capabilities of the Portal.










Social Value
Portal



National TOMs + COVID-19

Measurement Framework

Theme	Outcome	National TOMs		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Jobs Promote Local Skills and Employment</p>	More local people in employment	NT1	✓	No. of local direct employees (FTE) hired or retained (for re-tendered contract) on contract
		NT1a	✓	No. of local direct employees (FTE) (TUPE transfers) retained on contract
		NT1b	✓	No. residents (FTE) employed from listed sub-localities (direct/supply chain)
		NT1c	✓	No. of local people (FTE) on contract employed through the supply chain
		NT2	✓	Percentage of local employees (FTE) on contract
	Fair Work	NT74	+	Union recognition agreements & collective bargaining are present and encouraged
		NT75	+	Good and fair work charters are implemented
	More opportunities for disadvantaged people	NT3	✓	No. of employees (FTE) hired on contract who are long term unemployed (1+ yr)
		NT3a	+	No. of armed forces veteran employees (FTE) hired on the contract (LTU)
		NT3b	+	No. of homeless employees (FTE) hired on the contract
		NT3c	+	No. of mothers returning to work (FTE) hired on contract
		NT3d	+	No. of survivors of modern slavery employees (FTE) hired on contract
		NT4	✓	No. of employees (FTE) hired on the contract who are NEETs
		NT4a	+	No. of 16-25 y.o. care leavers (FTE) hired on the contract
		NT5	✓	No. of 18+ rehabilitating or ex-offenders (FTE) hired on the contract
		NT5a	+	No. of 18-24 rehabilitating young offenders (FTE) hired on the contract
		NT6	✓	No. of disabled employees (FTE) hired on the contract
		NT6a	+	No. of disabled armed forces veteran employees (FTE) hired on the contract
		NT7	✓	No. of hours supporting unemployed people into work (24 yo+)
		Improved skills	NT8	✓
	NT9		✓	No. of weeks of training opportunities on the contract - Level 2, 3 or 4+
	NT10		✓	No. of weeks of apprenticeships on the contract - Level 2, 3 or 4+
	Improved skills for disadvantaged people	NT9a	+	Weeks of training opps on contract for disadvantaged groups - Level 2, 3, or 4+
		NT10a	+	No. of weeks of apprenticeships for disadvantaged groups - Level 2, 3 or 4+
	Improved skills for a low carbon transition	NT54	+	Hrs supporting those in traditional high carbon industries to retrain (just transition)
		NT10b	+	No. weeks of apprenticeships on contract, low carbon economy - Level 2, 3 or 4+

Theme	Outcome	National TOMs		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Jobs Promote Local Skills and Employment</p>	Improved employability of young people	NT11	✓	No. of hours dedicated to support young people into work (16-24 yo)
		NT12	✓	Weeks of meaningful work placements / pre-employment courses (students, 1-6 wks, unpaid)
		NT13	✓	No. of weeks of meaningful paid work placements (6+ weeks, paid)
		NT13a	+	No. of weeks of meaningful work placements that pay Real Living wage (6+ weeks)
	Retaining jobs and skills during the COVID-19 crisis	C19-1		Percentage of directly employed staff on contract retained with pre-crisis level pay/hours
		C19-2		Percentage of directly employed staff on contract retained with agreed temporarily reduced hours
		C19-3		Percentage of staff on contract furloughed
		C19-4		Percentage of supply chain staff on contract retained
		C19-19		People hired who lost job or were unable to find work due to Covid
	 <p>Growth Supporting Growth of Responsible Regional Business</p>	More opportunities for local MSMEs and VCSEs	NT14	✓
NT15			✓	No. hours of expert business advice to VCSEs and MSMEs
NT15a			+	No. hours helping VCSEs and MSMEs achieve net zero carbon by 2050 or before
NT16			✓	Equipment or resources donated to VCSEs (£ equivalent value)
NT17			✓	Number of voluntary hours to support VCSEs (excl. expert advice)
NT18			✓	Total spent in the LOCAL supply chain through the contract
NT18a			✓	Total amount (£) spent through the contract in specified sub-localities
NT19			✓	Total amount (£) spent through the contract with LOCAL MSMEs
NT19a			+	Total spent with local micro and small enterprises through the supply chain
Improving staff wellbeing and mental health		NT20	✓	No. employees provided access to multidimensional wellbeing programmes
	NT55	+	No. employees provided workplace screening & support for anxiety & depression	
	NT39	✓	£ invested in mental health campaigns for staff	
	NT56	+	Percentage of suppliers implementing mental health core/enhanced standards	
Reducing inequalities	NT21	✓	Equality, diversity and inclusion training for staff & supply chain	
	NT57	+	% median gender salary gap for prime contractor staff - SMEs	
	NT40	✓	Number and type of initiatives put in place to reduce the gender pay gap	
	NT41	✓	Percentage of staff paid at least the relevant Real Living wage (Living Wage Foundation)	
	NT42	✓	Percentage of contractors in the supply chain required to pay at least Real Living wage	
	NT58	+	No. employees (FTE) on a renewed contract or TUPE to have a pay raise to Real living wage or higher	

Theme	Outcome	National TOMs		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>	
		Ref.	Core / Add		
 <p>Growth Supporting Growth of Responsible Regional Business</p>	Ethical Procurement is promoted	NT22	✓	Percentage of procurement contracts including commitments to ethical procurement	
		NT43	✓	Initiatives in the supply chain to identify & manage risks of modern slavery	
		NT59	+	No. supply chain audits to identify & manage risk of modern slavery occurring	
		NT60	+	No. people employed to identify & manage risk of modern slavery occurring	
		NT61	+	Percentage of invoices on the contract paid within 30 days	
	Cyber security risks are reduced	NT62	+	Companies in the supply chain that achieve relevant cyber security certifications	
	Social Value embedded in the supply chain	NT23	✓	Percentage of supply chain contracts with social value commitments, measurement & monitoring	
	Supporting workers, SMEs and VCSEs to face the COVID-19 crisis	C19-5			Support for SMEs/VCSEs to respond to the crisis & maintain business operations
		C19-6			Percentage of invoices on the contract paid to MSMEs and VCSEs within 30 days
		C19-7			Policy to support staff working remotely/on furlough re. mental health/wellbeing
		C19-8			Support for staff working remotely/on furlough re. mental health/wellbeing
		C19-9			Do you have a policy or strategy to provide safe virtual spaces to staff?
		C19-10			Initiatives to provide safe virtual spaces to staff (inc. cyber sec. guidance)
		C19-11			Initiatives to support own & supply chain staff delivering essential work
C19-12				Support for own & supply chain staff from vulnerable groups, economically	
C19-13				Percentage of contractors engaged with to implement COVID-19 response measures	
 <p>Social Healthier, Safer and more Resilient Communities</p>	Crime is reduced	NT24	+	Initiatives aimed at reducing crime	
	Creating a healthier community	NT25	+	Initiatives to be taken to tackle homelessness	
		NT63	+	Initiatives to support rough sleepers, inc. training for security & night staff	
		NT26	✓	Initiatives to engage the community in health or wellbeing initiatives	
	Vulnerable people are helped to live independently	NT27	✓	Initiatives to support older, disabled and vulnerable with community networks	
	More working with the Community	NT28	✓	Donations or in-kind contributions to local community projects (£ & materials)	
		NT29	✓	No. of hours volunteering time provided to support local community projects	
		NT30	+	Support local community draw up their own Community Charter/Stakeholder Plans	
	Supporting communities to deal with the COVID-19 crisis	C19-14			Strategy on best practice COVID-19 workspace social interactions for own & supply chain staff
		C19-15			Enable staff on the contract to safely volunteer within their community (COVID-19 support)
C19-16				Direct support to local authorities/VCSEs to deliver services to the vulnerable (COVID-19 support)	
C19-17				Campaign funding to increase understanding of crisis behavioural norms	
		C19-20		Redesign of spaces to address Covid related risks and impacts on staff and work	

Theme	Outcome	National TOMs		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Environment Decarbonising and Safeguarding our World</p>	Carbon emissions are reduced	NT31	✓	Savings in CO ₂ emissions on contract achieved through de-carbonisation
		NT44	✓	Policy and programme to achieve net zero carbon by 2050 or before
		NT64	+	Contributions made on the contract to own carbon offset fund or external provider
		NT45	✓	Carbon Certification
	Air pollution is reduced	NT32	+	No. car miles saved on contract (e.g. resulting from green transport programme)
		NT33	+	No. car miles driven using low or no emission staff vehicles
		NT46	✓	Corporate travel schemes available to employees on contract
		NT65	+	Percentage offleet or construction vehicles on contract that are at Least Euro 6 or LEV
		NT66	+	Fleet emissions monitoring programme on the contract, including data collection
	Safeguarding the natural environment	NT67	+	Donations towards environmental & biodiversity conservation initiatives
		NT47	✓	Donations or investments towards sustainable reforestation/afforestation
		NT68	+	Percentage of plastic recycling on contract
	Resource efficiency and circular economy solutions are promoted	NT69	+	Support internally and to supply chain to adopt Circular Economy solutions
		NT70	+	Single-use plastic packaging eliminated through reusable packaging solutions
		NT71	+	Value of local partnerships to implement circular economy solutions
		NT72	+	Hard-to-recycle waste diverted from landfill/incineration
	Sustainable Procurement is promoted	NT35	✓	Percentage of procurement contracts that include sustainable procurement commitments
		NT73	+	Percentage of supply chain contracts requiring use of low/zero emission vehicles
NT48		✓	Supply Chain Carbon Certification	
NT49		✓	No. hrs of climate change/carbon reduction training for supply chain staff	
COVID-19 environmental response	C19-18		Initiatives to support appropriate collection for discarded gloves and masks	
 <p>Innovation Promoting Social Innovation</p>	Social innovation to create local skills and employment	NT50	✓	Innovative measures to promote local skills and employment
	Social innovation to create local skills and employment	NT51	✓	Innovative measures to promote and support responsible business
	Social innovation to enable healthier safer and more resilient communities	NT52	✓	Innovative measures to enable healthier, safer and more resilient communities
	Social innovation to safeguard the environment and respond to the climate emergency	NT53	✓	Innovative measures to safeguard the environment



Social Value
Portal



Jobs

Promote local skills and employment

Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1a, NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people directly employed on the contract, e.g. as a result of this procurement requirements (if you are the procuring organisation) or other set targets. If you are the bidding organisation or are reporting for measurement, only direct employees should be included here, while employment through supply chain can be captured through NT1c where this is included. Employees should be residing in the local area and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the definition of local area provided for the contract. Measure NT1b might signpost specific sub-localities specified in LIST NT1b. If you are recording direct employees under NT1b please ensure no double counting occurs. Please check evidence requirements for details on postcode collection.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for directly employing your target number of local people on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the number of qualifying employees directly employed on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome

Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1, NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: This measure can be used alternatively to NT1 at Measurement whenever the contract has been renewed or entails TUPE transfers. Employees that fall within the TUPE transfer and that satisfy the Definition for NT1 should be recorded.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: N/A – The measure is designed to be used as an alternative to NT1 at Measurement. Commitments should be made at procurement against NT1.

Evidence Requirements: Specify the number of TUPE transfer direct employees retained on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome



Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1, NT1a, NT1c, as well as with NT18, NT18a, NT19, NT19a

Reporting

Local Economic Value

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people directly employed on the contract or employed through the supply chain. If you are a bidder you can include also jobs created through your own supply chain here. Recorded employees should be residing in the selected sub-localities (LIST NT1b) and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the list of specific sub-localities provided for this measure and for the specific contract (LIST NT1b). Please check evidence requirements for details on postcode collection. Include both direct employment and unlocked through the supply chain as a result of your procurement requirements. Should not be double counted with NT18/NT18a/NT19/NT19a. If you are recording direct employees under NT1 please ensure no double counting occurs.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, we ask you to calculate the full time equivalent (FTE) number of employees for the year. Please note that only employees with a contract duration that is at least one year or lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: Summarise your strategy for employing your target number of people from listed sub-localities on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome

Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1, NT1a, NT1b, as well as with NT18, NT18a, NT19, NT19a

Reporting

Local Economic Value

This measure should be reported as unlocked through the supply chain only

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people employed on the contract by the supply chain as a result of your procurement requirements. Employees included should be residing in the local area and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the definition of 'local area' provided for the specific contract. Please check evidence requirements for details on postcode collection. Should not be double counted with NT18/NT18a/NT19/NT19a.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your existing or planned requirements for the supply chain on local employment and their strategy for employing your target number of local people on this contract. For example, if they will advertise in local newspapers, please explain which ones and how regularly. Or, if they will cooperate with local job centres, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Local Economic Value

Technical Guidance

Definition: This is the percentage of people directly employed or employed through the supply chain as a result of your procurement requirements on the contract that reside within the local area, over the overall number of people employed on the contract. Please refer to the definition of local area provided above for NT1.

Unit Guidance: Number of local residents employed (directly and through the supply chain as a result of your procurement requirements) over the total number of employees on the contract – (%).

Target Guidance: Specify the total number of people that will be employed on this contract. Of these, what is the total number of local people that will be employed on this contract? If you have not done so for NT1, NT1b or NT1c summarise your strategy for employing your target number of local people on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the total number of people employed on this contract and the total number of local people employed on this contract. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded not monetised. This indicator reflects how the pledged intervention differs e.g. from the business as usual scenario. We are working at producing benchmarks for specific categories of projects that will help understand "what good looks like".

IOOI Rating: Outcome



Measurement

Unit: Y/N – Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This includes the existence of and facilitation of recognition agreements and of collective bargaining in the supply chain. Corporate policy and initiatives that encourage or facilitate both recognition agreements and collective bargaining in the supply chain can be included for evidencing. Relevant documents from suppliers also are to be provided for evidencing. For further government information please see the following link: <https://www.gov.uk/trade-union-recognition-employers>. Additional information on good practice can be found e.g. in UNISON's "Seeking recognition and achieving the best terms" report. (<https://www.unison.org.uk/content/uploads/2020/10/Seeking-recognition-and-achieving-the-best-terms-v8.pdf>).

Unit Guidance: Provide relevant documents.

Target Guidance: Please provide information on the situation of union recognition agreements or equivalent worker representation, as well as collective bargaining in the supply chain and how such engagement will be encouraged. Documentation and evidencing are to be provided. This can include among other things: supply chain data, past experiences, existing union recognition agreements or documentation that provides proof of equivalent worker representation, etc.

Evidence Requirements: Please provide information on the situation of union recognition agreements or equivalent worker representation, as well as collective bargaining in the supply chain and how such engagement has been encouraged. Documentation and evidencing are to be provided. This can include among other things: supply chain data, past experiences, existing union recognition agreements or documentation that provides proof of equivalent worker representation, etc.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



Measurement

Unit: Y/N – Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This is the implementation and facilitation of "good" or "fair" work practices and related charters on the contract. Such charters set out guidelines around what is understood as good practice in regard to fair work and how it can be facilitated. Examples for comprehensive good practice charters or comparable documents include, but are not limited to: The Scottish Fair Work Convention / Framework / Action Plan; The Welsh Government Fair Work Commission; The Mayor of London's Good Work Standard; Greater Manchester Combined Authority's Good Employer Charter; OECD Job Quality Framework / International Labour Organisation.

Unit Guidance: Provide relevant documents.

Target Guidance: Summarise how you plan to reflect and facilitate employment practices guided by "good" and "fair" work charters on contract. This includes providing information on any organisations you might want to partner with, as well as an evidencing of how the desired work practices are expected to be integrated into the relevant contract related operations and how they will impact the workforce on contract. It is further necessary to evidence how the proposed practices related to best practice examples outlined in comprehensive "good" or "fair" work charters.

Evidence Requirements: Summarize how you structured employment practices guided by ideas of by "good" and "fair" work as outlined in relevant charters on contract. This includes providing information on any organisations you partnered with, as well as an evidencing of how "fair" work practices were integrated into the relevant contract related operations and how they impacted the workforce on contract. Further, evidence how the implemented practices related to best practice examples outlined in comprehensive "good" or "fair" work charters.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3a, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people directly employed as a result of a specific and deliberate employment initiative. Record the number of full time annual equivalent (FTE) employees taken on as a result of the contract that had been claiming Jobseeker’s Allowance (JSA) or Universal Credit unemployment benefits for at least the 12 months preceding the start of the employment contract. For a definition of long term unemployment see: <https://www.gov.uk/government/publications/predicting-likelihood-of-long-term-unemployment-the-development-of-a-uk-jobseekers-classification-instrument-wp116>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3a, NT3b, NT3c, NT3d, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of long-term unemployed people on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

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Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3a, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: Average annualised increase in economic benefits to the individual over the course of his/her lifetime. Annualised fiscal benefits to the NHS resulting from average reduction in health care costs associated with being out of work based on Unit Cost Database v2.0 E&E1.0.3, updated to 2020/2021 prices. The operational costs related to the fiscal benefit to DWP and HM Revenue and Customs are now included as in Unit Cost Database v2.0 E&E1.0 and E&E1.0.1 and E&E1.0.2 updated to 2020/2021 prices, which is adding an additional value component to the proxy that was not picked up previously. Remaining fiscal benefits to DWP and HM Revenue and Customs are excluded as indicated in the source. See Unit Cost Database v2.0 for a more detailed cost breakdown. Conservative proxy based on generic JSA claimant. 3.45% deadweight has been applied to reflect the probability for a long term unemployed person of getting off unemployment benefits (the deadweight value has been adjusted based on estimates of the recent COVID impacts on the UK labour market, based on Nov. 2019 - Oct. 2020 data). This deadweight is appropriate for the first year of employment. For succeeding years of continued employment, deadweight should be adjusted to reflect improved odds of finding a job. Proxy values over £1000 are rounded to the nearest Pound. be adjusted to reflect improved odds of finding a job.

IOOI Rating: Impact



NT3a+

Theme: Jobs – Promote Local Skills and Employment

Outcome: More opportunities for disadvantaged people

Measure: No. of armed forces veterans employees (FTE) hired on the contract as a result of a recruitment programme who are long term unemployed (unemployed for a year or longer) and are facing specific barriers to transitioning to civilian employment that do not qualify them as disabled (e.g. long term service).

Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific deliberate employment initiative. Record the full time annual equivalent number of employees taken on that are armed forces veterans facing barriers to employment and have been claiming Jobseeker’s Allowance (JSA) or Universal Credit unemployment benefits for at least the 12 months preceding the start of the employment contract. For definitions and resources around veterans see: <https://www.gov.uk/government/organisations/veterans-uk>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3, NT3b-d, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of armed forces veterans that were previously LTU on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations, so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for LTU (long-term unemployed) people employed (NT3) and is being used provisionally for this measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT3 for the full Rationale.

IOOI Rating: Impact



NT3b

Theme: Jobs – Promote Local Skills and Employment

Outcome: More opportunities for disadvantaged people

Measure: No. of homeless employees (FTE) hired on the contract as a result of a recruitment programme.

Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that are homeless at the start of the employment contract and that had been claiming Jobseeker’s Allowance (JSA) or Universal Credit unemployment benefits for at least the 12 months preceding the start of the employment contract. For definitions and some resources: <https://www.crisis.org.uk/ending-homelessness/benefits-and-employment/employment-support/>; <https://www.homeless.org.uk/our-work/>; <https://www.shelter.org.uk/>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3, NT3a, NT3c-d, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of homeless people on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for LTU (long-term unemployed) people employed (NT3) and is being used provisionally for this measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT3 for the full Rationale.

IOOI Rating: Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3d, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific deliberate employment initiative. Record the full time annual equivalent number of mothers (when the mother is the primary carer) returning to work that have been unemployed for one year or longer (that had been claiming Jobseeker’s Allowance (JSA) or Universal Credit unemployment benefits for at least the 12 months preceding the start of the employment contract). Please note that this Measure is directed at mothers - and not parents more generally - as it is aimed at redressing gender inequalities in long term labour market outcomes resulting from the distribution of childcare across parents. ‘Despite progress towards greater gender equality, significant inequalities persist in the way that childcare responsibilities are divided up and shared, with women in the UK doing on average about twice as much childcare as men. This disparity contributes to gender gaps in both employment and earnings, with women being substantially disadvantaged relative to men. For example, in April to June 2017, 91.7% of fathers aged 25-34 were in work compared to just 67.7% of mothers’ (ONS, 2017d). For further information see: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/705898/Return_to_work-parental_decision_making.pdf. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3, NT3a-b, NT3d, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least

one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of mothers returning to work on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for LTU (long-term unemployed) people employed (NT3) and is being used provisionally for this measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT3 for the full Rationale.

IOOI Rating: Impact



Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific deliberate employment initiative. Record the full time annual equivalent number of survivors of modern slavery that have been unemployed for one year or longer, that have been claiming Jobseeker’s Allowance (JSA) or Universal Credit unemployment benefits for at least the 12 months preceding the start of the employment contract. Examples of recruitment programmes include: City Hearts/Co-op Bright Future scheme (<https://cityhearts.global/bright-future>) or equivalent. For further information see: <https://www.gov.uk/government/collections/modern-slavery>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply.

Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3, NT3a-c, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of survivors of modern slavery on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them. (For examples of programmes see e.g. City Hearts/Co-op Bright Future scheme (<https://cityhearts.global/bright-future>) or equivalent)

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for LTU (long-term unemployed) people employed (NT3) and is being used provisionally for this measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT3 for the full Rationale.

IOOI Rating: Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £14,782.00

Value for the Individual: £10,128.87 (68.52%)

Value for the Government: £4,652.69 (31.48%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of 16-24 yr. old employees taken on as a result of the contract that had not been in employment, education, or training (NEET) before the start of the employment contract. See the following link for a list of categories included: <https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/bulletins/youngpeoplenotineducationemploymentortrainingneet/november2019>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of people who are NEET on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) whether this is the first employment experience after having been NEET. For example, Employee 1: 3 months; full-time; 0.25 FTE; this is the first employment experience after being NEET. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Based on Unit Cost Database (UCDB) v2.0, E&E 9.0 and E&E9.1, updated to 2020/2021 prices. Based on people aged 18-24 and 16-17 who are Not in Education, Employment or Training (NEET) (Dec. 2019). Current costs and forgone benefits to the individual and the government associated with being NEET. Value to the individual comprises the loss of earnings to the young person whilst NEET (£10,534 for 18-24 y.o. and £5,177 for 16-17 y.o.). Fiscal value to the government comprises benefit payments (worklessness and housing benefits) and foregone tax and national insurance receipts (£4,984 for 18-24 y.o. and £606 for 16-17 y.o.). Deadweight combines the 41,3% of 18-24 y.o. NEETs being unemployed and the 39,7% of 16-17 y.o. NEETs being unemployed (Sept. 2020) with the off-JSA-benefit and off-UC/off-UC if it had been available in the area rates of 14,5% for 18-24 y.o. NEETs and 23% for 16-17 y.o. NEETs (Dec. 2019 - Nov. 2020). The employment data is sourced from Stat-Xplore (<https://stat-xplore.dwp.gov.uk/>). Deadweight should not be applied when the job opportunity would not have been created under the business as usual scenario. The proxy value is appropriate for the first year of employment. A red flag has been allocated in the UCDB v2.0 "in recognition of the global, top-down nature of the calculation, the age of the data, and the lack of consideration of wider fiscal elements such as costs associated with the health and/or crime impacts of being NEET." Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Outcome / Impact



NT4a+

Theme: Jobs – Promote Local Skills and Employment

Outcome: More opportunities for disadvantaged people

Measure: No. of 16-25 y.o. care leavers (FTE) hired on the contract as a result of a recruitment programme.

Measurement

Unit: No. people FTE

Valuation

Proxy: £14,782.00

Value for the Individual: £10,128.87 (68.52%)

Value for the Government: £4,652.69 (31.48%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that were 16-25 years old at the start of the employment period, not in employment, education or training and that are care leavers. For definitions and resources around care leavers see: <https://www.gov.uk/childcare-parenting/children-and-young-people-leaving-care>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of care leavers on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) whether this is the first employment experience after having been care leavers. For example, Employee 1: 3 months; full-time; 0.25 FTE; this is the first employment experience after being care leaver. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for NEETs (NT5) and is it being used provisionally for this Measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT5 for the full Rationale.

IOOI Rating: Outcome / Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £24,527.00

Value for the Individual: £18,007.18 (73.42%)

Value for the Government: £3,734.71 (15.23%)

Value for the Community: £2,785.26 (11.36%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees aged 18+ taken on as a result of the contract that were within the rehabilitation period before the start of the employment contract. Support from Youth Offending Teams (<https://www.gov.uk/youth-offending-team>), Jobcentre Plus or other agencies carrying out specific programmes may be beneficial in identifying eligible individuals. For guidance about rehabilitation periods see: <https://www.gov.uk/exoffenders-and-employment>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of 18+ year old rehabilitating or ex-offenders on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that they were an 18+ year old rehabilitating or ex-offender before the start of the employment contract; that this is the first employment experience as an ex-offender. For example, Employee 1: 3 months; full-time; 0.25 FTE; was a 29 year old rehabilitating or ex-offender before the start of the employment contract; this is the first employment experience. Provide details of any organisation partnered with Information provided should be made compliant with data protection requirements (GDPR).

See Next Page 

Measurement

Unit: No. people FTE

Valuation

Proxy: £24,527.00

Value for the Individual: £18,007.18 (73.42%)

Value for the Government: £3,734.71 (15.23%)

Value for the Community: £2,785.26 (11.36%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: The proxy value comprises the value to the individual from entering the labour market (annualised increase in lifetime earnings), the fiscal value to the NHS resulting from an average reduction in health care costs associated with being out of work, as well as the economic, fiscal and wellbeing value to society from preventing reoffending. The figures included in the proxy are the UK values for the population aged 18+. All components are based on Unit Cost Database (UCDB) v2.0 figures, updated to 2020/2021 prices, and MOJ prevention of reoffending statistics. See UCDB v2.0 for a more detailed description of unemployment and crime costs. An across-crimes crime multiplier of 4.3 has been applied to reflect the ratio of estimated total number of crimes (based on the Crime Survey for England and Wales, formerly British Crime Survey) to the number of comparable crimes recorded by the police (a UK weighted average of crime type multipliers - weighted according to the 2015/2020 distribution of reported crimes by typology - derived by GMCA Research Team and presented in the UCDB v2.0). A 3.96 multiplier has been applied to the average number of offences per offender, to take into account unproven offences (based on MOJ Crime statistics). The figures included in the proxy are the UK level values for the population aged 18+. They can be localised by choosing average reoffending figures for the relevant geographical area. Deadweight is established separately to reflect the reduction in reoffending probabilities for employed rehabilitating offenders (dw: 91%), and the average probability for rehabilitating offenders to be employed respectively (dw: 17%). Deadweight figures should be adjusted to reflect primary data from the project when available, e.g. by using success rates in preventing reoffending from a rehabilitating offender programme run in partnership with (or by) a VCSE. The proxy

value is appropriate for the first year of employment. For succeeding years of continued employment, it should be adjusted to reflect an increased probability of finding a job. Value to the individual or business who suffered the crime is £18,007, the value to the government is £3,735 and the value to society is £2,785. These have been calculated based on the UCDB v2.0 Economic, Fiscal and Social components and Comments. Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Impact



NT5a+

Theme: Jobs – Promote Local Skills and Employment

Outcome: More opportunities for disadvantaged people

Measure: No. of 18-24 y.o. employees (FTE) hired on the contract who are rehabilitating young offenders as a result of a recruitment programme.

Measurement

Unit: No. people FTE

Valuation

Proxy: £23,299.00

Value for the Individual: £17,663.25 (75.81%)

Value for the Government: £3,344.50 (14.35%)

Value for the Community: £2,290.82 (9.83%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees aged 18 to 24 taken on as a result of the contract that were within the rehabilitation period before the start of the employment contract. Support from Youth Offending Teams (<https://www.gov.uk/youth-offending-team>), Jobcentre Plus or other agencies carrying out specific programmes may be beneficial in identifying eligible individuals. For guidance about rehabilitation periods see: <https://www.gov.uk/exoffenders-and-employment>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of 18-24 year old rehabilitating offenders on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that they were a 18-24 year old rehabilitating offender before the start of the employment contract; that this is the first employment experience as an ex-offender. For example, Employee 1: 3 months; full-time; 0.25 FTE; was a 23 years old ex-offender before the start of the employment contract; this is the first employment experience. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

See Next Page



Measurement

Unit: No. people FTE

Valuation

Proxy: £23,299.00

Value for the Individual: £17,663.25 (75.81%)

Value for the Government: £3,344.50 (14.35%)

Value for the Community: £2,290.82 (9.83%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: The proxy value comprises the value to the individual from entering the labour market (annualised increase in lifetime earnings), the fiscal value to the NHS resulting from an average reduction in health care costs associated with being out of work, as well as the economic, fiscal and wellbeing value to society from preventing reoffending. The figures included in the proxy are the UK values for the population aged 18-24. All components are based on Unit Cost Database (UCDB) v2.0 figures, updated to 2020/2021 prices, and MOJ prevention of reoffending statistics. See UCDB v2.0 for a more detailed description of unemployment and crime costs. An across-crimes crime multiplier of 4.3 has been applied to reflect the ratio of estimated total number of crimes (based on the Crime Survey for England and Wales, formerly British Crime Survey) to the number of comparable crimes recorded by the police (a UK weighted average of crime type multipliers - weighted according to the 2015/2020 distribution of reported crimes by typology - derived by GMCA Research Team and presented in the UCDB v2.0). A 3.96 multiplier has been applied to the average number of offences per offender, to take into account unproven offences (based on MOJ Crime statistics). The figures included in the proxy are the UK level values for the population aged 18-24. They can be localised by choosing average reoffending figures for the relevant geographical area. Deadweight is established separately to reflect the reduction in reoffending probabilities for employed rehabilitating offenders (dw: 91%), and the average probability for rehabilitating offenders to be employed respectively (dw: 17%). Deadweight figures should be adjusted to reflect primary data from the project when available, e.g. by using success rates in preventing reoffending from a rehabilitating offender programme run in partnership with (or by) a VCSE. Deadweight should not be applied when the job opportunity would not have been created under the business as usual scenario. The proxy value is appropriate for the first year of employment. For succeeding years of continued employment, it should

be adjusted to reflect an increased probability of finding a job. Value to the individual or business who suffered the crime is £17,663, the value to the government is £3,345 and the value to society is £2,291. These have been calculated based on the UCDB v2.0 Economic. Fiscal and Social components and Comments. Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,787.47 (10.89%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that are disabled. A disabled person is defined as "someone with a physical or mental impairment that has a 'substantial' and 'long-term' effect on their ability to do normal daily activities" (Equality Act 2010). For guidance about employing disabled people and support programmes for employers please see: <https://www.gov.uk/government/publications/employing-disabled-people-and-people-with-health-conditions/employing-disabled-people-and-people-with-health-conditions>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of disabled people on this contract. For example, it is likely you will need to cooperate with job centres, care homes or charities so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE). For example, Employee 1: 3 months; full-time; 0.25 FTE. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

See Next Page

Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,787.47 (10.89%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: Based on Unit Cost Database v2.0, E&E 2.0, updated to 2020/2021 prices. This proxy is based on "illustrative estimate by the Department of Work and Pensions (DWP) of the costs and benefits that would occur if some hypothetical 'typical' ESA WRAG (Work-Related Activity Group) claimant (who would otherwise have remained on benefits) were to move into employment for one additional year" (see UCDB v2.0 for a more detailed description). Value to the individual comprises increased earnings as a result of entering employment. Value to the government includes savings to the NHS related to a reduction in health care costs associated with being out of work. Fiscal benefits to the DWP have been excluded. Deadweight is based on the statistic that 50% of disabled unemployed are very likely to be long term unemployed. Therefore the deadweight figure is a weighted average of the probability of finding a job for a long-term unemployed person (4.62%) and the generic probability of finding a job for the generic JSA claimant (the deadweight value has been adjusted for the recent COVID impacts on the UK labour market, based on Nov. 2019 - Oct. 2020 data and inferences from the impact of the 2008/09 financial crisis). The proxy value is appropriate for the first year of employment. For succeeding years of continued employment it should be adjusted to reflect the increased probability of finding a job. Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Impact



NT6a+

Theme: Jobs – Promote Local Skills and Employment

Outcome: More opportunities for disadvantaged people

Measure: No. of armed forces veterans employees (FTE) hired on the contract as a result of a recruitment programme who are disabled and are facing specific barriers to transitioning to civilian employment (e.g. physical injury, medical discharge, psychological condition).

Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,633.12 (9.95%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that are armed forces veterans facing barriers to employment due to a disability. A disabled person is defined as "someone with a physical or mental impairment that has a 'substantial' and 'long-term' effect on their ability to do normal daily activities" (Equality Act 2010). For guidance about employing disabled people and support programmes for employers please see: <https://www.gov.uk/government/publications/employing-disabled-people-and-people-with-health-conditions/employing-disabled-people-and-people-with-health-conditions>. For definitions and resources around veterans see: <https://www.gov.uk/government/organisations/veterans-uk>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3, NT3a, NT3b, NT3c, NT3d, NT4, NT5, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of disabled armed forces veterans on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE). For example, Employee 1: 3 months; full-time; 0.25 FTE. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for disabled people employed (NT6) and is being used provisionally for this measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT6 for the full Rationale.

IOOI Rating: Impact

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT8, NT11

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to individual or group employment support. Units targeted or claimed within this Measures should not be double counted with other similar Measures, including NT11.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people. The cumulative number across sessions should be reported.

Target Guidance: Summarise your strategy for supporting unemployed people into work (including the number of staff hours to be spent and the number of people to be supported). For each session, the number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours. The cumulative number across sessions should be reported. Describe the activity/activities to be carried out and provide details of any partner organisations you will work with.

Evidence Requirements: Specify the number of sessions, and for each session specify the duration, the number of staff providing unemployment support and the number of unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a sectoral shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: No. staff hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT11

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to the preparation and delivery of curriculum related activities including literacy support, career talks, safety talks, etc. Please provide a description of the range of activities provided. Units targeted or claimed within this Measures should not be double counted with other similar Measures, including NT17 and NT29.

Unit Guidance: Example: if 10 staff have spent 3 hours each, then the total number of hours reported should be 30.

Target Guidance: Summarise your workplan for delivering your target number of local school and college visits. Provide a breakdown of the number of staff hours to be spent on each visit (preparation versus delivery). For example, if 10 staff will spend 3 hours each, then the total number of hours reported should be 30.

Evidence Requirements: Provide the names of the schools/colleges visited and a breakdown of the number of staff hours spent on each visit (including time spent preparing and then delivering the session). For example, if 10 staff have spent 3 hours each on a visit, then the total number of hours reported for that visit should be 30. Describe the visits and the activities delivered and provide any supporting information, e.g. a confirmation from the school/college after the visit. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering. It is based on the Office of National Statistics (ONS) hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input

Measurement

Unit: No. weeks

Valuation

Proxy: £286.47

Value for the Individual: £286.47 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT11

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of training opportunities created specifically for the contract or that are made use of on contract can be counted, for those weeks during which a person works primarily on contract. Only vocational training opportunities supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT10 and other Measures around apprenticeships or vocational qualifications.

Unit Guidance: Record weeks of vocational qualification training provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as it will be supported to completion.

Target Guidance: Summarise your strategy for providing your target number of weeks of training for vocational qualifications on this contract, including details of how you will support completion of the qualifications. If possible, provide details of the accredited training provider, the type and the level of the outcomes to be achieved as well as the resulting qualification.

Evidence Requirements: Specify the number of people in vocational qualification training on this contract and the number of weeks of training per person. Provide details of the accredited training provider, the type and the level of the outcomes achieved as well as the resulting training qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

Technical Proxy Rationale: The proxy value has been computed combining the current economic benefit to the individual (based on minimum pay given the distribution of achievements by age and their average length), and the annualised future lifetime value to society of achieving the qualification (based on Unit Cost Database (UCDB) v2.0 updated to 2020/2021 prices, and the distribution of achievements by level). Value to the individual therefore includes current increased earnings and annualised value of future increased earnings as a result of achieving the qualification. It is the lower estimate, and reflects an assumption that 50% of the employment benefit is attributed to the qualification (see UCDB v2.0 for details). Estimates of distribution of achievements by age, average length, and level are based on data from the FE data library: further education and skills (<https://www.gov.uk/government/statistical-data-sets/fe-data-library-vocational-qualifications--2>), and BIS Returns to Intermediate and Low Level Vocational Qualifications, 2011. Per week attribution of lifetime benefits is based on the assumption that each week equally contributes to achieving the qualification. This assumption is likely to be revisited in future editions, to pick up on non-linearities.

IOOI Rating: Impact

Measurement

Unit: No. weeks

Valuation

Proxy: £224.07

Value for the Individual: £224.07 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT9a, NT10a, NT10b

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of apprenticeships created specifically for the contract or that are made use of on contract can be counted, for those weeks during which apprentices work primarily on contract. Only apprenticeships supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT9.

Unit Guidance: Record weeks of training for the apprenticeships provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as the apprenticeship will be supported to completion.

Target Guidance: Summarise your strategy for providing the target number of apprenticeship weeks on this contract, including details of how you will support completion of the apprenticeships. If possible, provide details of the accredited training provider, the type and the level of the apprenticeships to be achieved as well as the resulting qualifications. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Evidence Requirements: Specify the number of people on apprenticeships on this contract and the number of apprenticeship weeks per person. Provide details of the accredited training provider, the type and the level of the apprenticeship achieved, as well as the resulting qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Technical Proxy Rationale: The proxy value has been computed combining the current economic benefit to the individual (based on minimum pay given the distribution of achievements by age and their average length), and the annualised future lifetime value to society of achieving an apprenticeship (based on Unit Cost Database (UCDB) v2.0 updated to 2020/2021 prices, and the distribution of achievements by level and gender). If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider. Value to the individual therefore includes current increased earnings and annualised value of future increased earnings as a result of achieving the qualification. It is the lower estimate, and reflects an assumption that 50% of the employment benefit is attributed to the qualification (see UCDB v2.0 for details). Estimates of distribution of achievements by age, average length, and level are based on data from the FE data library: further education and skills (<https://www.gov.uk/government/statistical-data-sets/fe-data-library-further-education-and-skills> and <https://www.gov.uk/government/statistical-data-sets/fe-data-library-apprenticeships>). Per week attribution of lifetime benefits is based on the assumption that each week equally contributes to achieving the qualification. This assumption is likely to be revisited in future editions, to pick up on non-linearities.

IOOI Rating: Impact



NT9a+

Theme: Jobs – Promote Local Skills and Employment

Outcome: Improved skills for disadvantaged people

Measure: No. of weeks of training opportunities on the contract (BTEC, City & Guilds, NVQ, HNC) that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+ - delivered for groups specified in 'LISTNT9a' (e.g. NEETs, under-represented gender and ethnic groups, disabled, homeless, rehabilitating young offenders)

Measurement

Unit: No. weeks

Valuation

Proxy: £286.47

Value for the Individual: £286.47 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT10, NT10a, NT10b

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of training opportunities created specifically for the contract or that are made use of on contract can be counted, for those weeks during which a person works primarily on contract. Please refer to the list of target groups specified for this Measure on the contract (LIST NT9a). Only vocational training opportunities supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT10 and other Measures around apprenticeships or vocational qualifications.

Unit Guidance: Record weeks of training provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as it will be supported to completion.

Target Guidance: Summarise your strategy for providing your target number of weeks of training for vocational qualifications on this contract and for engaging with the listed target categories (LIST NT9a), including details of how you will support completion of the qualifications. If possible, provide details of the accredited training provider, the type and the level of the outcomes to be achieved as well as the resulting qualification. If you are going to work with a charity or third sector partner to reach the targeted group, please provide details for those.

Evidence Requirements: Provide evidence of how you have reached the targeted categories - e.g. targeted upskilling programme reports or documented partnerships with a relevant third sector organisation. Specify the number of people in training on this contract including the number of weeks of training per person. Provide details of the accredited training provider, the type and the level of the outcomes achieved as well as the resulting training qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

Technical Proxy Rationale: Please note that this proxy value does not capture the additional specificity of the target groups the opportunity is being provided for, it is the same proxy value of NT9. At procurement only, a prioritisation weighting can be used to differentiate the two measures if appropriate. See NT9 for the full rationale.

IOOI Rating: Impact



NT10a+

Theme: Jobs – Promote Local Skills and Employment

Outcome: Improved skills for disadvantaged people

Measure: No. of weeks of apprenticeships on the contract that have either been completed during the year, or that will be supported by the organisation to completion in the following years - Level 2,3, or 4+ - delivered for groups specified in 'LIST NT10a' (e.g. NEETs, under-represented gender and ethnic groups, disabled, homeless, rehabilitating young offenders).

Measurement

Unit: No. weeks

Valuation

Proxy: £224.07

Value for the Individual: £224.07 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT9a, NT10, NT10b

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of apprenticeships created specifically for the contract or that are made use of on contract can be counted, for those weeks during which apprentices work primarily on contract. Please refer to the list of target groups specified for this Measure on the contract (LIST NT10a). Only apprenticeships supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT9.

Unit Guidance: Record weeks of training for the apprenticeships provided on the contract for categories in LIST NT10a . Apprenticeships must be supported to completion, even if this support extends beyond the duration of the contract.

Target Guidance: Summarise your strategy for providing the target number of apprenticeship weeks on this contract, as well as your strategy for engaging with the listed target categories (LIST NT10a), including details of how you will support completion of the apprenticeships. If possible, provide details of the accredited training provider, the type and the level of the apprenticeships to be achieved, as well as the resulting qualifications. Provide details of any charity or third sector partner you plan to work with to reach the targeted group. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Evidence Requirements: Provide evidence of how you have reached the targeted categories, e.g. targeted upskilling programme reports or documented partnerships with a relevant third sector organisation. Specify the number of people on an apprenticeship on this contract and the number of weeks of apprenticeship per person. Provide details of the accredited training provider, the type and the level of the apprenticeships achieved as well as the resulting qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Technical Proxy Rationale: The proxy value does not capture the additional specificity of the target groups the opportunity is being provided for, it is the same proxy value as NT10. If an apprenticeship has been part-financed through the apprenticeship levy, attribution must be applied to account for reduced costs of provision for the apprenticeship provider. At procurement only, a prioritisation weighting can be used to differentiate NT10 and NT10a, if appropriate. See NT10 for the full rationale.

IOOI Rating: Impact

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Training programmes for people to acquire skills for the low carbon economy and renewable technologies (e.g. technical feasibility analysis, solar system design, solar panel installation, energy efficiency, community engagement). For guidance on initiatives see "A toolkit for city regions and local authorities", Ashden - examples include Repowering's Youth Training programme (<https://www.repowering.org.uk/>). Examples for traditionally high carbon industries are: Non-renewable energy and fuels (e.g. coal, oil and gas), materials (e.g. chemicals, iron and steel, cement, forestry), transportation.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Describe the programme you are planning to deliver, the number of people benefitting that are in "traditional" high carbon industries and also the number of hours of training planned for each participant. Describe any certificates or qualifications that will be achieved.

Evidence Requirements: Describe the nature and relevance of the training, and any certificates or qualifications achieved. Report the number of employees in high carbon industries that have benefitted, and number of hours of training provided.

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: No. weeks

Valuation

Proxy: £224.07

Value for the Individual: £224.07 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT9a, NT10, NT10a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of apprenticeships created specifically for the contract or that are made use of on contract, can be counted for the weeks during which apprentices work primarily on contract. This Measure should be used specifically for apprenticeships relevant to the low carbon economy (Relevant activity areas include renewable energy production and distribution; environmental consulting services; technical and advisory services; water, sewage and waste sustainable management; supporting manufacturing services; remodelling and renovation services; installation and repair services, etc). Only apprenticeships supported to completion should be counted. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find a registered qualification see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT10, NT10a, or similar Measures.

Unit Guidance: Record weeks of training for the apprenticeships provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as the apprenticeship will be supported to completion.

Target Guidance: Summarise your strategy for providing the target number of apprenticeship weeks on this contract, including details of how you will support completion of the apprenticeships. If possible, provide details of the accredited training provider, the type and the level of the apprenticeships to be achieved as well as the resulting qualifications and relevance for the low carbon economy. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Evidence Requirements: Specify the number of people on apprenticeships on this contract and the number of apprenticeship weeks per person. Provide details of the accredited training provider, the type and the level of the apprenticeship achieved, as well as the resulting qualification and its relevance for the low carbon economy. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Technical Proxy Rationale: The proxy value does not capture the additional specificity of the target groups the opportunity is being provided for, it is the same proxy value as NT10. If an apprenticeship has been part-financed through the apprenticeship levy, attribution must be applied to account for reduced costs of provision for the apprenticeship provider . At procurement only, a prioritisation weighting can be used to differentiate NT10 and NT10b, if appropriate. See NT10 for the full rationale.

IOOI Rating: Impact



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT8

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to individual or group employment support specifically for people under 24 years old. This Measure requires support to be targeted and focussed on the participating individuals. Group sessions should therefore be of a size that allows for individuals to be supported based on their specific needs. Units targeted or claimed within this Measure should not be double counted with other similar Measures including NT7.

Unit Guidance: The number of units reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of the number of people delivering the session.

Target Guidance: Summarise your strategy for supporting unemployed people into work (including the number of staff hours to be spent and the number of people to be supported). Describe the activity/activities to be carried out and provide details of any partner organisations you will work with.

Evidence Requirements: Specify number of sessions, and for each session the duration, number of staff providing unemployment support and unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: No. weeks

Valuation

Proxy: £168.72

Value for the Individual: £168.72 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. Only work placements for students with a duration of 1 to 6 weeks (typically unpaid) should be registered here. The cumulative number of weeks (from 1 to 6 for each student work placement) should be registered. This Measure does not apply to placements longer than 6 weeks as the TOMs discourage unpaid long-term employment.. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships>. Should not be double counted with other work placement Measures.

Unit Guidance: Number of total student placement weeks on the contract (only student placements between 1-6 weeks).

Target Guidance: Summarise your strategy for providing your target number of weeks of student work placements or pre-employment courses on this contract. Specify the type of student work placements or/and pre-employment courses that will be provided, including what kind of industry-based experience they will result in and how. As you will cooperate with schools, colleges, or universities, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of people in student work placements or pre-employment courses on this contract, and for each person specify: the duration in weeks and type of the work placement or pre-employment course. Describe the industry-based experience gained and provide details of the school, college or university partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current equivalent economic benefit to the individual from equivalent increased earnings, based on minimum pay given the distribution of apprenticeships achievements by age.

IOOI Rating: Output

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £168.72

Value for the Individual: £168.72 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. The cumulative number of weeks of work placements (noting that each placement must last 6 weeks or more) should be registered. This Measure does not apply for placements shorter than 6 weeks as meaningful learning opportunities should be promoted.. Only placements paid at least minimum or national living wage, as per governmental regulations, should be included. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships> and here <https://www.gov.uk/national-minimum-wage-rates>. Should not be double counted with NT12 or similar work placement Measures.

Unit Guidance: Number of weeks in total on the contract (note that each placement must be at least 6 weeks).

Target Guidance: Summarise your strategy for providing your target number of positions and weeks of paid work placements on this contract. Specify the type of work placements (as well as pay type, i.e. minimum wage, national living wage or higher wage) that will be provided, including what kind of industry-based experience they will result in and how. If you will partner with any organisations, schools, colleges or universities, please specify which you will partner up with and how you will approach these.

Evidence Requirements: Specify the number of people in work placements, and for each person specify the following: the duration in weeks and type (including pay type, i.e. minimum wage, national living wage, higher wage) of the work placement. Describe the industry-based experience gained and provide details of any organisations, schools, colleges or universities that you have partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current economic benefit to the individual from actual minimum increased earnings, based on minimum pay given the distribution of apprenticeship achievements by age.

IOOI Rating: Output



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £332.50

Value for the Individual: £332.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. The cumulative number of weeks of work placements (noting that each placement must be longer than 6 weeks) should be registered. Only placements paid at least UK Real Living Wage, as defined by the Living Wage Foundation should be included. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships> and here <https://www.livingwage.org.uk/>. Units targeted or claimed should not be double counted with similar work placement Measures.

Unit Guidance: Number of weeks in total on the contract.

Target Guidance: Summarise your strategy for providing your target number of positions and weeks of paid work placements on this contract. Specify the type of work placements (as well as pay type, i.e. UK Real Living Wage, London Living wage, or higher wage) that will be provided, including what kind of industry-based experience they will result in and how. If you will cooperate with any organisation, school, college or university, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of people in work placements, and for each person specify: the duration in weeks and type (including pay type, i.e. UK Real Living Wage, London Living wage, or higher wage) of the work placement. Describe the industry-based experience gained and provide details of any organisation, school, college or university partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current economic benefit to the individual from actual minimum increased earnings, based on based on UK Real Living Wage pay.

IOOI Rating: Output



C19-1

Theme: Jobs – Promote Local Skills and Employment

Outcome: Retaining jobs and skills during the COVID-19 crisis

Measure: Safeguarding jobs on contract - Percentage of directly employed staff on contract retained with pre-crisis level pay and hours (to be used at Management/ measurement only - not Procurement).

Measurement

Unit: % of directly employed staff on contract retained

Valuation

Proxy: Record only

Reporting

Local Economic Value

Technical Guidance

Definition: Employment contracts for own staff on the contract - maintaining the same time and pay conditions. This Measure can be used at management/measurement only. Given the current crisis, innovation and engagement with creative and best practice solutions are encouraged. Examples or innovative and best practice solutions can be accessed through the following links: Support for business through the Coronavirus Job Retention Scheme (<https://www.gov.uk/government/publications/guidance-to-employers-and-businesses-about-covid-19/covid-19-support-for-businesses#support-for-businesses-through-the-coronavirus-job-retention-scheme>). For jobs that have not been retained at the original contract conditions or that have been terminated, please provide a description of the operating context and type of contracts (i.e. effect of COVID 19 on ability to operate contract e.g. closure of sites - schools, offices, etc.) Please specify if relevant where employees have been redeployed internally. For employment contracts that have been terminated, explain how you have given due consideration to realistic alternatives for retaining those jobs before resorting to redundancies.

Unit Guidance: Number of own staff retained on contract maintaining pre crisis time and pay conditions at the end of the reporting period over the overall number of own staff employed on the contract at the beginning of the reporting period (*100).

Evidence Requirements: Specify the overall number of own staff employed on the contract at the beginning of the reporting period and the number of own staff retained at the end of the reporting period - maintaining the same time and pay conditions. Provide reference to the relevant payroll document. Information provided should be made compliant with data protection requirements (GDPR). For jobs that have been terminated, please provide a description of the operating context and type of contracts (i.e. effect of COVID 19 on ability to operate contract e.g. closure of sites - schools, offices, etc.) Please specify if relevant where employees have been redeployed internally. For employment contracts that have been terminated, explain of how you have given due consideration to realistic alternatives for retaining those jobs before resorting to redundancies. Evidence requirements about giving due consideration to realistic alternatives should be applied and considered with proportionality to the scale, scope and impact of the crisis on the contract.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



C19-2

Theme: Jobs – Promote Local Skills and Employment

Outcome: Retaining jobs and skills during the COVID-19 crisis

Measure: Percentage of staff on contract retained with agreed temporarily reduced hours (to be used at Management/measurement only - not Procurement) - This is to reduce layoffs for directly employed staff on contract that can only partially deliver against their responsibilities as a result of the COVID-19 crisis.

Measurement

Unit: % of directly employed staff on contract retained - with reduced hours

Valuation

Proxy: Record only

Reporting

Local Economic Value

Technical Guidance

Definition: Employment contracts for own staff on the contract retained with altered conditions (e.g. time and pay). This Measure can be used at management/ measurement only. Please provide a description of the changes made to all affected contracts (time reduced or pay reduced and how) and the operating contexts (i.e. effect of COVID 19 on ability to operate contract e.g. closure of sites - schools, offices, etc.). Please specify if relevant where these employees have been redeployed internally. Please provide evidence that you have given due consideration to realistic alternatives for retaining them at the original employment conditions before resorting to reductions in time or pay. Evidence requirements about giving due consideration to realistic alternatives should be applied and considered with proportionality to the scale, scope and impact of the crisis on the contract.

Unit Guidance: Number of own staff retained with time or pay alterations on contract at the end of the reporting period over the overall number of own staff employed on the contract at the beginning of the reporting period (*100).

Evidence Requirements: Specify the overall number of own staff employed on the contract at the beginning of the reporting period and the number of own staff retained with time or pay alterations at the end of the reporting period. Examples include but are not limited to: working week reduced to 3 day for a specific list of employment contracts or pay reduced to 80% for a specific list of employment contracts. Provide a description of all alterations (e.g. percentage of reduction in time or pay) and reference to the relevant payroll documents. Information provided should be made compliant with data protection requirements (GDPR). Please provide a description of the operating context (i.e. effect of COVID 19 on ability to operate contract e.g. closure of sites - schools, offices, etc.). Specify if relevant where these employees have been redeployed internally. Provide evidence of how you have given due consideration to realistic alternatives for retaining those jobs without alterations before resorting to reducing time and/or pay. Evidence requirements about giving due consideration to realistic alternatives should be applied and considered with proportionality to the scale, scope and impact of the crisis on the contract.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



C19-3

Theme: Jobs – Promote Local Skills and Employment

Outcome: Retaining jobs and skills during the COVID-19 crisis

Measure: Reducing layoffs for directly employed staff on contract that can no longer work as a result of the COVID-19 crisis - Percentage of staff on contract furloughed (to be used at Management / measurement only - not Procurement).

Measurement

Unit: % of directly employed staff on contract furloughed

Valuation

Proxy: Record only

Reporting

Local Economic Value

Technical Guidance

Definition: Under the Coronavirus Job Retention Scheme, all UK employers with a PAYE scheme will be able to access support to continue paying part of their employees' salary for those that would otherwise have been laid off during this crisis. This Measure can be used at management/ measurement stage only (not in procurement). This applies to your own employees who have been asked to stop working, but who are being kept on the payroll, otherwise described as 'furloughed workers'. HMRC will reimburse 80% of their wages, up to £2,500 per month. This is to safeguard workers from being made redundant.

The Coronavirus Job Retention Scheme will cover the cost of wages backdated to 1st November 2020, and currently runs until 30 April 2021. (<https://www.gov.uk/government/publications/guidance-to-employers-and-businesses-about-covid-19/covid-19-support-for-businesses#support-for-businesses-through-the-coronavirus-job-retention-scheme>). Please provide evidence that you have given due consideration to realistic alternatives (e.g. reduced time and pay) before proceeding with furlough. Evidence requirements about giving due consideration to realistic alternatives should be applied and considered with proportionality to the scale, scope and impact of the crisis on the contract.

Unit Guidance: Number of own staff on contract furloughed at the end of the reporting period over the overall number of own staff employed on the contract at the beginning of the reporting period (*100).

Evidence Requirements: Specify the overall number of staff employed on the contract at the beginning of the reporting period and the number of staff furloughed at the end of the reporting period. Provide reference to the relevant payroll document. Information provided should be made compliant with data protection requirements (GDPR). Please provide evidence that you have given due consideration to realistic alternatives (e.g. reduced time and pay) before proceeding with furlough. Evidence requirements about giving due consideration to realistic alternatives should be applied and considered with proportionality to the scale, scope and impact of the crisis on the contract.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



C19-4

Theme: Jobs – Promote Local Skills and Employment

Outcome: Retaining jobs and skills during the COVID-19 crisis

Measure: Safeguarding supply chain jobs on contract - Percentage of supply chain staff on contract retained either at pre-crisis level pay and hours or with temporarily altered conditions (e.g. reduced time and pay, to be specified)- (to be used at Management/Measurement only - not Procurement).

Measurement

Unit: % of supply chain staff on contract retained

Valuation

Proxy: Record only

Reporting

Local Economic Value

This measure should be reported as unlocked through the supply chain only

Technical Guidance

Definition: Supply chain employment contracts for staff not terminated before the original end date or renewed - maintaining the same time and pay conditions or with temporarily altered conditions (e.g. reduced time and pay, to be specified in the description). This Measure can be used at management/measurement only (not in procurement). Given the current crisis situation, innovation and engagement with creative and best practice solutions are encouraged. Examples of innovative and best practice solutions can be accessed through the following links: Support for business through the Coronavirus Job Retention Scheme (<https://www.gov.uk/government/publications/guidance-to-employers-and-businesses-about-covid-19/covid-19-support-for-businesses#support-for-businesses-through-the-coronavirus-job-retention-scheme>). For jobs that have not been retained at the original contract conditions or that have been terminated, please provide a description of the operating contexts and type of contracts (i.e. effect of COVID 19 on ability to operate contract e.g. closure of sites e.g. schools, offices, etc.) Please specify if relevant where supply chain staff have been redeployed internally. For employment contracts that have been terminated or where pay and time conditions have been reduced please offer an explanation of how you have given due consideration to realistic alternatives. Evidence requirements about giving due consideration to realistic alternatives should be applied and considered with proportionality to the scale, scope and impact of the crisis on the contract.

Unit Guidance: Number of supply chain staff retained on contract at the end of the reporting period over the overall number of supply chain staff employed on the contract at the beginning of the reporting period (*100).

Evidence Requirements: Specify the overall number of supply chain staff employed on the contract at the beginning of the reporting period and the number of supply chain staff retained at the end of the reporting period either at full or temporarily reduced time and pay. Provide description of any altered conditions (e.g. reduce time and pay) and contracts where they have been applied, together with reference to the relevant documents. Reductions in supply chain staff working on contract resulting from non-contract related redundancies do not have to be counted. Information provided should be made compliant with data protection requirements (GDPR). For jobs that have been terminated, please provide a description of the operating context and type of contracts (i.e. effect of COVID 19 on ability to operate contract e.g. closure of sites - schools, offices, etc.) Please specify if relevant where supply chain staff have been redeployed internally. For employment contracts that have been terminated or where pay and time conditions have been reduced please explain how you have given due consideration to realistic alternatives. Evidence requirements about giving due consideration to realistic alternatives should be applied and considered with proportionality to the scale, scope and impact of the crisis on the contract.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



C19-19

Theme: Jobs – Promote Local Skills and Employment

Outcome: Retaining jobs and skills during the COVID-19 crisis

Measure: No. people hired who had previously lost their job or had been unable to find work due to Covid-19.

Measurement

Unit: No. people

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: The number of people hired on the contract who had lost their job or had been unable to find work due to Covid-19. For included employees, evidence must be provided of their Covid-19 related joblessness. For further information on joblessness related to Covid-19 please see the House of Commons Library BRIEFING PAPER Number 8898, 26 November 2020 - Coronavirus: Impact on the labour market (<http://researchbriefings.files.parliament.uk/documents/CBP-8898/CBP-8898.pdf>). The paper provides information of varying impacts of Covid-19 on the job market. In particular, the paper outlines disproportionate economic impacts of Covid-19 on BAME (Black, Asian, Minority Ethnic), women, young workers, low paid workers and disabled workers.

Unit Guidance: Upload evidence regarding outreach to eligible people and on the eligibility of recorded employees and provide a total number of eligible employees employed on contract.

Target Guidance: Summarise your strategy for employing your target number of eligible people on this contract. For example, if you will cooperate with local job centres, please specify which centres you plan to work with and how you will approach engaging with them.

Evidence Requirements: Specify the number of qualifying employees employed on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). Evidence has to be provided regarding the eligibility of each employee recorded through this Measure.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



**Social Value
Portal**



Growth

Supporting growth of responsible regional business



NT14

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: More opportunities for local MSMEs and VCSEs

Measure: Total amount (£) spent with VCSEs within your supply chain.

Measurement

Unit: £

Valuation

Proxy: £0.12

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.12 (100%)

Reporting

Social Value

Technical Guidance

Definition: Amount spent on suppliers for the contract that are voluntary, community or social enterprises. This might include e.g. choosing a catering company that employs rehabilitating offenders, or a furniture service that recycles donated furniture, or a social enterprise recruitment consultancy, etc. Social Enterprise UK have a useful tool to identify social enterprises that have membership with them based on location <https://directory.socialenterprise.org.uk/seuk/en/seuk-members/>. You may refer to the local economic development team in the council to identify potential partners. This is the additional SV (SVA) from spending with a VCSE. A relevant SROI multiplier can be substituted to this default value when available and assured, by using the additional multiplier column in the Measurement Calculator. The total SVA from selecting a local VCSE in the supply chain can be computed by adding the appropriate NT14 and NT18 multipliers, when NT18 or NT19 are not directly included in the analysis. Should not be double counted with NT18 and NT19 or other relevant Measures if those are included.

Unit Guidance: £ spent with VCSEs in the supply chain. Note that they do not need to be local VCSEs. Please see the Rationale for more on double counting.

Target Guidance: Provide a breakdown of the estimated pounds to be spent with VCSEs in your supply chain on this contract, including the name of the VCSEs (or a range of potential names) and the type of goods/services to be procured from each.

Evidence Requirements: Provide a breakdown of pounds spent with VCSEs within your supply chain on this contract, including the name of the VCSEs and the type of goods/ services procured from each

Technical Proxy Rationale: Value to society resulting from average financial resources reinvested by VCSEs in their social mission (lower bound based on SEs). Assumed average profitability of 25%, wage differential with respect to non-VCSEs of 12.5% (there is about a 12.5% differential between the national Living Wage and the minimum wage for +25 y.o.), and average of 35% of profits reinvested into social purpose. An amber robustness assessment has been attributed given the relative scarcity of specific data and statistics on the various differentials for VCSEs. This is the additional SV (SVA) from spending with a VCSE. A relevant SROI multiplier can substituted to this default value when available and assured, by using the additional multiplier column in the Measurement Calculator. The total SVA from selecting a local VCSE in the supply chain can be computed by adding the appropriate NT14 and NT18 multipliers, when NT18 or NT19 are not directly included in the analysis (i.e. if doing so please avoid double counting by only recording the same spend under one Measure).

IOOI Rating: Input / Output



Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (e.g. financial advice / legal advice / HR advice / HSE) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs). Please include only the amount of volunteering that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. Please note that MSMEs are defined as (0-250 employees) - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, and NT29. Please check also other relevant expert time Measures included.

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice to VCSEs/MSMEs. Provide the names of the VCSEs/MSMEs you will support or a range of options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advice/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



NT15a+

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: More opportunities for local MSMEs and VCSEs

Measure: Provision of expert business advice to help VCSEs and MSMEs achieve net zero carbon.

Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (specifically around decarbonisation) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs) to achieve net zero carbon. In line with international ambitions, it is advised to aim for a reduction of emissions to net zero as soon as possible, with 2050 being the minimum target reflecting current UK government policy and an earlier target to be strongly encouraged. Many private sector organisations, sectoral institutions such as the World Green Building Council and more than 100 LAs have set the more ambitious 2030 target. Please include only the number of hours of expert staff time that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. MSMEs are defined as 0-250 employees - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, and NT29. Please check also other relevant expert time Measures included..

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice around decarbonisation to VCSEs/MSMEs to achieve net zero carbon. Provide the names of the VCSEs/MSMEs you will support or details of proposed options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert decarbonisation advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent supporting each VCSE/MSME, the type of expert advice provided, as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advise/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Relevant activities include donating a van to a community organisation or the use of office accommodation, etc. Equivalent £ value should be calculated and assumptions and details about the calculation should be made explicit. Attribution might need to be taken into account where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the toolkit guidance document for worked examples on attribution. Should not be double counted with N17 and NT28 and other Measures around donation of equipment or resources.

Unit Guidance: Equivalent £ value of the donation.

Target Guidance: Provide a list of VCSEs you have already identified or a range of options. Provide a breakdown of the value of resources and/or equipment to be donated to VCSEs, including the names of the VCSEs.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the VCSEs. This proxy is based on primary data, a pre-determined value cannot be established. A resource-specific valuation exercise of the assets should be carried out and accurately described.

IOOI Rating: Output



NT17

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: More opportunities for local MSMEs and VCSEs

Measure: Number of voluntary hours donated to support VCSEs (excludes expert business advice).

Measurement

Unit: No. staff expert hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: Volunteering is defined by the International Labour Organisation (2001) as ‘unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household’. Here, only staff volunteering hours should be recorded when time has been allocated for staff to spend on formal volunteering (not for family and friends). Please include only the amount of volunteering that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked examples on attribution. The following Measures should not be double counted : NT15, NT16, NT24, NT25, NT26, NT27, NT28, and NT29 and other volunteering Measures.

Unit Guidance: Number of staff hours spent on volunteering with VCSEs. For example, if 10 staff volunteer 3 hours each, then the reported total should be 30.

Target Guidance: Specify the list of VCSEs that are going to be supported and describe the volunteering activities to be delivered and their intended purposes. Provide a breakdown of staff volunteering hours to be delivered to VCSEs. For example, if 10 staff volunteer 3 hours each, then the reported total should be 30.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering. It is based on the Office of National Statistics (ONS) hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18a, NT19, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18a, NT19 and NT19a.

Unit Guidance: Total amount of £ spent with the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific basis to identify the % increase in local spend with respect to the business-as-usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business-as-usual scenario is made.

IOOI Rating: Outcome



NT18a

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: More opportunities for local MSMEs and VCSEs

Measure: Total amount (£) spent through the contract in specified sub-localities (e.g. high deprivation areas) - please refer to list NT18a for the qualifying areas.

Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT19, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the specified sub-localities identified for the contract in list NT18a. This should be calculated as the cumulative spend with suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.**

This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18, NT19 and NT19a and other relevant spend Measures.

Unit Guidance: Total amount of £ spent with the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with organisations in your supply chain within the specified sub-localities on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each, as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with organisations in your local supply chain within the specified sub-localities (LIST NT18a) on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services procured from each, and the first half of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect a higher need due to e.g. high deprivation and this should be captured through prioritisation at procurement and through a separate indicator at measurement. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT18a, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with MSME suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the contract's supply chain. Should not be double counted with NT14, NT18, NT18a and NT19a. Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees).

Unit Guidance: Total amount of £ spent with MSMEs (0-249 employees) in the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of £ to be spent with organisations in your supply chain within the specified local area for this contract. Specify the name of each eligible supplier, including the category (MSME)/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of £ spent with organisations in your local supply chain. Specify the name of each eligible supplier, specifying that it is a Micro, Small or Medium Enterprise, and include the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect the specificity of spending with MSMEs. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome



NT19a+

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: More opportunities for local MSMEs and VCSEs

Measure: Total amount (£) spent through contract with local micro and small enterprises within your supply chain.

Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT18a, NT19, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with suppliers that are based within the local area and are Micro or Small enterprises. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18, NT18a, and NT19. Micro (0-9 employees), Small (10-49 employees).

Unit Guidance: Total amount of £ spent with Micro and Small Enterprises (0-49 employees) in the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with Micro and Small organisations in your supply chain within the specified local area on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with Micro and Small organisations in your supply chain within the local area specified on this contract. Specify the name of each eligible supplier, specifying that is a Micro or Small Enterprise, and include the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect the specificity of spending with Micro and Small enterprises. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: No. employees provided access

Valuation

Proxy: £131.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £131.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: Total number of direct or supply chain employees on contract provided with access to comprehensive and multidimensional workplace wellbeing programmes. Qualifying programmes should include the following dimensions, be well managed and employee benefits focussed, and be easily accessible and engaging to employees: flexible working time arrangements; healthy nutrition options; physical health programmes; a health risk appraisal questionnaire; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues). If offered digitally, e.g. to cater to those employees working from home, programmes should reflect potentially changed needs and staff expectations around workplace wellbeing derived through continued and meaningful consultation and engagement with employees. This is to ensure offered services remain relevant and are comprehensively provided. For a discussion of good practice approaches to improve staff wellbeing, please see the "Best Practice in Promoting Employee Health and Wellbeing in the City of London" research report: <https://www.birmingham.ac.uk/Documents/research/ias/employee-health-and-wellbeing-in-the-city-of-london-final.pdf>

Unit Guidance: Number of employees on contract that have access to qualifying staff wellbeing programmes.

Target Guidance: Summarise your strategy for providing access to a comprehensive workplace wellbeing programme to all employees, including measures in place or planned. Describe how the programme you are going to deliver is going to be structured around the following dimensions: flexible working time arrangements; healthy nutrition options; physical health; health risk appraisal questionnaires; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues). If you are partnering with any specialist organisation, please provide details or a range of options.

Evidence Requirements: Please upload a description of the wellbeing programme you have delivered and the number of people on the contract that had access to that. Provide evidence for all of the following for the contract context: employment contract based flexible working time arrangements; access to healthy nutrition options and physical health programmes; if available provide information on use rate of healthy nutrition options and physical health programmes. Information on physical health programmes can include the structure of health and wellbeing support and advice; evidence on and structure of health risk appraisal questionnaire; access to health and wellbeing resources (health improvement web portal; information on use of wellness literature; availability and times of seminars and workshops focused on identified wellness issues). If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Average increase in productivity per worker on contract from a workplace wellbeing programme, during the year of delivery. Calculated as a conservative percentage of the assessed increased productivity resulting from reduced absenteeism and presenteeism due to ill health within a sample programme. Measures in the assessed wellbeing programme include: flexible working time arrangements; healthy nutrition options; physical health programmes including personalised health and wellbeing information and advice; a health risk appraisal questionnaire; access to a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues. (Knapp, M., McDaid, D. and Parsonage, M., 2011. Mental health promotion and mental illness prevention: The economic case.; Mills, P.R., Kessler, R.C., Cooper, J. and Sullivan, S., 2007. Impact of a health promotion program on employee health risks and work productivity. American Journal of Health Promotion, 22(1), pp.45-53.) Please note the proxy has been modelled for a large enterprise, and it might underestimate the costs of delivering the programme for smaller businesses.

IOOI Rating: Outcome



Measurement

Unit: No. employees provided access

Valuation

Proxy: £142.52

Value for the Individual: (0%)

Value for the Government: £16.14 (11.32%)

Value for the Community: £126.39 (88.68%)

Reporting

Social Value

Technical Guidance

Definition: Total number of direct or supply chain employees on contract having been screened through a mental health survey. The survey must be geared towards assessing risks of depression and anxiety among the workforce. Those employees identified as suffering from or at risk of depression and/or anxiety and interested in treatment have to be provided with access to a minimum of 6 sessions of CBT (Cognitive Behavioural Therapy) to address their mental health problems.

Unit Guidance: Number of employees on contract that have been screened through mental health screening and that also have access to CBT treatment if their screening identifies anxiety or depression issues.

Target Guidance: Summarise your strategy for providing access to mental health screening questionnaires for all employees on the contract and providing access to a minimum of 6 CBT sessions for all those employees that have been identified within the questionnaire as having depression or anxiety issues. If you are partnering with any specialist organisation, please provide details or a range of options.

Evidence Requirements: Provide evidence for mental health screening and availability of CBT sessions for own and sub-contractor employees on contract. This can include example mental health questionnaire; evidence for CBT service provision. If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Average annualized per person economic benefit from providing access to mental health screening and CBT (cognitive behavioural therapy) for workers on contract - calculation based on per person fiscal savings to the NHS and local authority, and additional earnings for employees suffering from depression and or anxiety that are in treatment; benefit is averaged out for the entire workforce. Workplace based enhanced depression care consists of completion by employees of a screening questionnaire, followed by care management for those found to be suffering from, or at risk of developing, depression and/or anxiety disorders. Those identified as being at risk of depression or anxiety disorders are offered a course of cognitive behavioural therapy (CBT) delivered in six sessions over 12 weeks. This intervention has been shown in a number of studies to be effective in tackling depression and reducing productivity losses in various workplaces. (Knapp, M., McDaid, D. and Parsonage, M., 2011. Mental health promotion and mental illness prevention: The economic case.; Unit Cost Database, 2019, Health Tab, HE11 measure).

IOOI Rating: Outcome



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: These are campaigns run on contract to remove stigma and promote mental health on the contract. Campaigns are to be provided for direct staff and supply chain staff. The cumulative cash value should be recorded for organising and running such campaigns.

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour).

Target Guidance: Specify the planned costs (£) to deliver the mental health campaigns on the contract (including the number of staff hours valued at £16.09 per hour, i.e., the general value for volunteering (NT17)). Describe the type and focus of the initiatives and information on who they will be targeted at (e.g. own staff or supply chain). Provide details of any organisations you intend to partner with to deliver the initiatives.

Evidence Requirements: Provide a breakdown of costs (£) to deliver each mental health campaign, and a summary of the number of people you have engaged where relevant. If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Input value - this proxy measures the value of resources (e.g., costs of putting on the events including hiring of spaces, stands and staff time) invested in Mental Health Campaigns for staff and supply chain staff on the contract.

IOOI Rating: Input/Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: As per Measure, for further information please see: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/658145/thriving-at-work-stevenson-farmer-review.pdf

Unit Guidance: Record only.

Target Guidance: Please provide evidence on the projected percentage of relevant suppliers as per Measure that will implement the mental health core standards (applicable for all companies) and the mental health enhanced standards (applicable for companies with more than 500 employees), as set out in Thriving at Work: the Stevenson Farmer Review on Mental Health and Employers.

Evidence Requirements: Please provide evidence on the actual percentage of relevant suppliers as per Measure that have implemented the mental health core standards (applicable for all companies) and the mental health enhanced standards (applicable for companies with more than 500 employees), as set out in Thriving at Work: the Stevenson Farmer Review on Mental Health and Employers. Please provide evidence through a provision of relevant documentation.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £101.86

Value for the Individual: £101.86 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: This includes training provided to own staff, Tier 1 supply chain and subcontractors specifically around equality, diversity and inclusion. Record the cumulative number of hours experienced by the attendees and specify both separately as a description. Only training provided for supply chain organisation at no cost to them should be included. Should not be double counted with NT20.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Describe your strategy for delivering equality, diversity and inclusion training to own staff and supply chain on this contract. Provide a workplan, including number of staff hours that will be spent and the number of people that will be involved in the training both from your own organisations and from those in the supply chain. Explain the objectives of the training session(s) and how progress towards these objectives will be monitored over the course of the contract.

Evidence Requirements: Provide a breakdown of staff hours spent providing equality, diversity and inclusion training to own staff and supply chain organisations on this contract, including the number of people involved in the training. Describe the objectives of the training session(s) and how progress towards these objectives will be monitored over the course of the contract. Information provided should be made compliant with General Data Protection Regulations (GDPR). If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: The proxy reflects the average estimated cost of training if delivered by an external consultant. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: % median gender pay gap

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This is the median pay gap at corporate level in hourly rates for men and women for the full workforce. It includes both full-time and part-time workers. It is calculated as the difference between median hourly earnings (excluding overtime) of men and women as a proportion of median hourly earnings (excluding overtime) of men, (*100). The gender pay gap is not to be confused with equal pay, which refers to the legal requirement that men and women must be paid the same amount for similar work. Guidance on calculations can be found here: <https://www.gov.uk/guidance/gender-pay-gap-reporting-make-your-calculations>. Please note that small and medium enterprises are defined as having between 50 and 249 employees. Please note that the median gender pay gap loses accuracy the smaller the company.

Unit Guidance: Guidance on calculations can be found here: <https://www.gov.uk/guidance/gender-pay-gap-reporting-make-your-calculations>.

Target Guidance: Guidance on calculations can be found here: <https://www.gov.uk/guidance/gender-pay-gap-reporting-make-your-calculations#hourly-pay-figures-you-must-calculate>. Median gender pay gap in hourly pay can be calculated by following these steps:

1. Arrange the hourly pay rates of all male full-pay relevant employees from highest to lowest;
2. Take the hourly pay rate of the middle-ranked man – this gives you the median hourly rate of pay for men;
3. Arrange the hourly pay rates of all female full-pay relevant employees from highest to lowest;
4. Take the hourly pay rate of the middle-ranked woman – this gives you the median hourly rate of pay for women;
5. Subtract the median hourly pay rate for women from the median hourly pay rate for men;
6. Divide the result by the median hourly pay rate for men;
7. Multiply the result by 100 – this gives you the median gender pay gap in hourly pay as a percentage of mens' pay.

Evidence Requirements: Provide evidence of your calculations from payroll data and, if you have done so, a narrative identifying the challenges and possible causes of the gender pay gap within your organisation, together with your ideas on how to address them. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Guidance on practices that reduce the gender pay gap: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/731288/Gender-Pay-Gap-actions_.pdf.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Please describe initiatives and how you plan to implement them. You can include e.g. changes to recruitment and promotion practices, relevant networking and mentoring programmes, flexibility and shared parental leave policies, and specific training for staff (for examples of relevant practices see https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/731288/Gender-Pay-Gap-actions_.pdf). Please provide a description of initiatives to be delivered on the contract and a breakdown of projected costs for each. If you are partnering with any specialist organisation, please provide details.

Evidence Requirements: Provide a list of initiatives included and describe their aims and reach, together with any assessment of their impact if available (quantitative or qualitative). For each initiative, provide a breakdown of the £ invested. If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Input value - this proxy measures the value of resources (e.g. costs of putting on events including hiring of spaces, stands and staff time, etc.) invested in the initiatives on the contract.

IOOI Rating: Input/Output



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: The current Real Living wage for the UK as set by the Living Wage foundation is £9.50 per hour, while the London rate is £10.85 per hour (<https://www.livingwage.org.uk/>). Please apply the appropriate rate as the relevant threshold depending on the contract.

Unit Guidance: Apply relevant rates depending on location of the contract.

Target Guidance: Please specify what Real Living Wage rates you are applying (UK or London rate) to the workforce, or to what percentages of the workforce on the contract if this only partially includes the London area.

Evidence Requirements: Please provide evidence of the total number of employment contracts and the number of employment contracts where staff are paid at least Real Living wage according to the relevant local rate. For more information see: <https://www.livingwage.org.uk/>. All data should be reported in compliance with GDPR requirements.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: The current Real Living wage for the UK as set by the Living Wage foundation is £9.50 per hour, while the London rate is £10.85 per hour (<https://www.livingwage.org.uk/>). Please apply the appropriate rate as the relevant threshold depending on the contract. MSMEs (0-249 employees): Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees).

Unit Guidance: (Total numbers of suppliers on the contract paying Real Living wage at relevant rate / Total number of suppliers on the contract)* 100; to arrive at a percentage.

Target Guidance: Please specify what Real Living Wage rates you are applying (UK or London rate) and to which contractors. Please specify the total number of contractors, and the ones that will be paying Real Living Wage to all staff on the contract. Please specify how many of these you will be supporting to do so as MSMEs and how you will support them.

Evidence Requirements: Please specify what Real Living Wage rates you have been applying (UK or London rate) and to which contractors. Please specify the total number of suppliers on the contract, and the ones that have been paying the Real Living Wage to all staff on the contract. Please specify how many of these you have supported to do so are MSMEs. All data should be reported in compliance with GDPR requirements.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: No. people FTE

Valuation

Proxy: £1,420.00

Value for the Individual: £1,420.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: On a renewed contract or TUPE, or when there is a relevant benchmark for the workforce on the contract and existing pay conditions. Can be used to monitor progress towards paying Real Living wage to all staff. The current Real Living wage for the UK as set by the Living Wage foundation is £9.50 per hour, while the London rate is £10.85 per hour (<https://www.livingwage.org.uk/>). The calculations are conservatively assuming the UK value is applied. Any difference in rates due to the contract being delivered in London can be implemented at Measurement by calculating an additional multiplier for the total and applying it in the Measurement Calculator.

Unit Guidance: Number of employment contracts on the contract that have been renewed or retained and that have raised pay to Real Living Wage, as set by the Real Living wage foundation, or higher.

Target Guidance: Please provide the estimated number of FTE employment on contract that are being renewed for which you are going to increase the wage to Real Living Wage or higher (see Definition). Please specify what Real Living Wage rates are you anticipating to apply as thresholds (UK or London rate) to the workforce, or to what percentages of the workforce on the contract if this only partially includes the London area. Use of London Living wage as opposed to UK living wage can be captured at Measurement.

Evidence Requirements: Please provide evidence of the total number of renewed or retained employment contracts where you have raised the wage to Real Living wage according to the relevant local rate (<https://www.livingwage.org.uk/>), or higher. For each contract, provide a list of the previous and new salary figures. Please specify what Real Living Wage rates you are applying as a threshold (UK or London rate) to the workforce, or the percentage of the workforce on the contract each rate of Real Living wage is paid to if this only partially includes the London area. All data should be reported in compliance with GDPR requirements.

Technical Proxy Rationale: Annual economic benefit to an individual employed full time resulting from increased earnings calculated conservatively based on the UK real living wage (lower than the London living wage) as set by the Living Wage Foundation.

IOOI Rating: Output



NT22



Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Ethical Procurement is promoted

Measure: Percentage of your procurement contracts that include commitments to ethical employment practices in the local and global supply chain, including verification that there is zero tolerance of modern slavery, child labour and other relevant requirements such as elimination of false self-employment, unfair zero hours contracts and blacklists.

Measurement

Unit: Record only

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: Percentage of contracts within the supply chain that include commitments to ethical employment practices in the local and global supply chain, including requirements to ensure the supply chains are free from slavery and that encourage effective and transparent reporting. Please refer to: <https://www.antislaverycommissioner.co.uk/media/1329/independent-anti-slavery-commissioners-strategic-plan-19-21-screen-readable.pdf>. Should not be double counted with NT23, NT35, and other relevant Measures.

Target Guidance: Specify the total number of procurement contracts on this contract and the total number of those that will include commitments to ethical employment practices. If possible and applicable, provide a copy of your ethical procurement policy and a copy of your modern slavery statement.

Evidence Requirements: Specify the total number of procurement contracts on this contract and the total number of those that include commitments to ethical employment practices. If applicable, provide a copy of your ethical procurement policy and a copy of your modern slavery statement.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: These are initiatives run by your organisations to strengthen the identification, monitoring and reduction of risks of modern slavery and unethical work practices occurring within the supply chain for the contract. Initiatives might include supply chain mapping, staff training, robust checking processes for recruitment and agency workers (e.g. right to work checks, bank account checks, address checks), engagement programmes with the supply chain to communicate expectations and requirements around modern slavery and to offer support to solve challenges, etc.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: These are initiatives you are planning to run to strengthen the identification, monitoring and reduction of risks of modern slavery occurring within the supply chain for the contract. Identify and describe planned initiatives, and for each initiative provide a breakdown of expected costs.

Evidence Requirements: Describe delivered relevant initiatives, and for each initiative provide a breakdown of the costs. Provide detail of the number of organisations in the supply chain for the contract involved.

Technical Proxy Rationale: Input value - this proxy measures the value of resources (e.g. costs of putting on events including hiring of spaces, stands and staff time, etc.) invested in the initiatives on the contract.

IOOI Rating: Input/Output



Measurement

Unit: No. audits

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: Internal and external (independent third party) comprehensive supply chain modern slavery audits delivered, including announced and unannounced direct and supply chain site audits. For more information on tackling modern slavery in supply chains see: https://www.local.gov.uk/sites/default/files/documents/LGA_Modern%20Slavery%20Transparency%20in%20supply%20chains%20statements%20-%20Aide%20Memoire_May%202018.pdf.

Unit Guidance: Number of internal/external or announced/unannounced audits.

Target Guidance: Describe the number and nature of audits planned and provide a breakdown by type.

Evidence Requirements: Please provide a list of modern slavery audits delivered, specify if external/internal and announced/unannounced. Specific frequency per site/contractor. Provide reference to results or reports for each.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: No. people FTE

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: These are people employed at corporate level with specific responsibilities on the contract to understand and manage the risks of modern slavery. Both direct qualifying employees and people employed through the supply chain can be claimed, as long as the relevant positions in the supply chain(s) are required by contractual agreements. Attribution might need to be taken into account where the person is responsible for multiple contracts.

Unit Guidance: The measurement unit can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, we ask you to calculate the full time equivalent (FTE) number of employees for the year. Please note that only employees with a contract duration of at least one year or lasting the full duration of the contract (if this is shorter) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full-time basis for a period of 12 months. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements.

Target Guidance: Identify number of people and specify modern slavery responsibilities on the contract for each.

Evidence Requirements: Please provide a list of relevant employees and their specific modern slavery related responsibilities on the contract. Please provide information on their modern slavery related qualifications.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: As per Measure's phrasing. (Such payment terms can alleviate pressures especially on MSMSs and VCSEs within the supply chain and help tackle modern slavery issues.).

Unit Guidance: (Number of invoices paid within 30 days / Number of invoices paid on the contract) * 100 to arrive at a percentage.

Target Guidance: Please specify your payment conditions on the contract and commitments on the percentage of invoices paid within 30 days.

Evidence Requirements: Please specify the total number of invoices paid on the contract and the number of invoices paid within 30 days. Please provide evidence of implemented payment terms.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Cyber Essentials and Cyber Essentials Plus are schemes backed by the Government’s National Cyber Security Centre. The schemes aim to help an organisation protect against common cyber security risks and cyber attacks. The schemes offer two certifications: Cyber Essentials and Cyber Essentials Plus. Cyber Essentials certification works through a self-assessment aimed at reducing risks and preventing the most common cyber attacks. Cyber Essentials Plus certification meanwhile is more comprehensive and involves a hands-on technical verification. For further information please see: <https://www.ncsc.gov.uk/cyberessentials/overview>.

The National Cyber Security Centre’s 10 steps to cyber security have been designed to help organisations protect themselves in cyberspace. They break down different tasks of defending networks, systems and information into important components. They also provide advice on how to build up organisational capacities and capabilities to achieve the best possible security in each of these areas. For further information please see: <https://www.ncsc.gov.uk/collection/10-steps-to-cyber-security/the-10-steps>.

Unit Guidance: Provide relevant documents, including relevant supplier names and numbers.

Target Guidance: Please provide information and evidence on the expected number and the percentage of companies in the supply chain that will be operating on the contract and have either: a Cyber Essentials certification, a Cyber Essentials Plus certification, or that follow the 10 steps to cyber security. Please provide information on if and how you plan to engage with suppliers to incentivise them to consider Cyber Essentials certification or following the 10 steps to cyber security.

Evidence Requirements: Please provide information and evidence on the number and the percentage of companies in the supply chain operating on the contract that have either: a Cyber Essentials certification, a Cyber Essentials Plus certification, or that follow the 10 steps to cyber security. Please provide information on if and how you engaged with suppliers to incentivise them to consider Cyber Essentials certification or to follow the 10 steps to cyber security.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: This includes quantitative requirements in terms of social value delivered, monitoring and measurement mechanism for delivery (e.g. the National Themes, Outcomes and Measures system or equivalent). Should not be double counted with NT22 and NT35.

Unit Guidance: N/A

Target Guidance: Specify the total number of procurement contracts on this contract and the number of contracts that will include commitments to deliver social value on this contract. Explain how you will monitor and measure social value delivered through the supply chain on this contract, including how you will engage with your supply chain to promote social value.

Evidence Requirements: Specify the total number of procurement contracts on this contract and the total number of contracts that include commitments to deliver social value on this contract. Explain how you have monitored and measured social value delivered through the supply chain on this contract, including how you have engaged with your supply chain to promote social value.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



C19-5

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Provide support for MSMEs and VCSEs to respond to the COVID-19 crisis and maintain business operations - hours of expert support provided by staff.

Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This Measure identifies staff time that you have donated to SMEs or VCSEs to provide professional support with their organisational response to the COVID emergency (logistics, human resources, legal or financial advice, organisational or management advice, etc).

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for staff providing expert support to SMEs and VCSEs to respond to the COVID-19 crisis and maintain business operations. Examples could include but are not limited to: sharing online resources and capabilities, building online capacities, sharing resources and infrastructure, etc. Given the current crisis situation it is encouraged to be innovative and engage with creative and best practice solutions. Examples for innovative and best practice solutions can be accessed through the following links: UK Government COVID-19 guidance for employees, employers and businesses (<https://www.gov.uk/government/publications/guidance-to-employers-and-businesses-about-covid-19>); Good Things Foundation - initiative working on improving digital skills (<https://www.goodthingsfoundation.org/>).

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/SMEs to manage the COVID-19 crisis. Provide the details of the VCSEs/SMEs you have supported. Specify the number of staff hours spent for each VCSE/SME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the average estimated cost of training if delivered by an external consultant. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



C19-6

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Percentage of invoices on the contract paid to MSMEs and VCSEs within 30 days.

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: As per the Measure's phrasing. Applies to MSMEs and VCSEs.

Unit Guidance: Please specify the total number of invoices to MSMEs and VCSEs to be paid on the contract and the number of those invoices that will be paid within 30 days.

Target Guidance: Please specify your payment conditions for MSMEs and VCSEs on the contract and commitments on the percentage of invoices to be paid within 30 days.

Evidence Requirements: Please specify the total number of invoices to MSMEs and VCSEs to be paid on the contract and the number of those invoices that will be paid within 30 days. Please provide evidence of payment terms implemented.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



C19-7

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Do you have a policy or a strategy to provide support around mental health and wellbeing to staff working remotely or on furlough?

Measurement

Unit: Y/N - Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This is about setting up virtual support screening and channels for staff working remotely around mental health and wellbeing. A strategy could specify the main objective and audiences as well as the scope of the guidance, distribution channels and delivery or enforcement responsibilities.

Unit Guidance: Y/N (Provide documents).

Target Guidance: Specify whether you have a policy or strategy to provide mental health and wellbeing support to staff working remotely as well as to staff that is on furlough. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: Protect home workers (<https://www.hse.gov.uk/toolbox/workers/home.htm>); Mental Health in the workplace (<https://www.acas.org.uk/supporting-mental-health-workplace>); Working from home (<https://www.acas.org.uk/working-from-home>).

Evidence Requirements: Provide relevant documents.

Technical Proxy Rationale: N/A

IOOI Rating: –



C19-8

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Initiatives to provide support to staff working remotely or on furlough around mental health and wellbeing.

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is about setting up virtual support screening and channels for staff working remotely around mental health and wellbeing. Applies to own and supply chain essential workers, as outlined by UK Government (see e.g.: <https://www.gov.uk/government/publications/coronavirus-covid-19-maintaining-educational-provision/guidance-for-schools-colleges-and-local-authorities-on-maintaining-educational-provision>).

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources.

Target Guidance: Summarise initiatives for providing mental health and wellbeing support to staff working remotely as well as to staff that are on furlough. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: Protect home workers (<https://www.hse.gov.uk/toolbox/workers/home.htm>); Working from home (<https://www.acas.org.uk/working-from-home>); Leesman home working survey (https://homeworkingsurveydemo.leesmanindex.co.uk/FnjaCDant8XCGoJZ?mc_cid=3efac67cc4&mc_eid=9abc6bd76a).

Evidence Requirements: Provide description of the initiatives including aims, audiences and delivery responsibilities, alongside details of organisations you may have partnered with. Please provide a report of implementation for the reporting period.

Technical Proxy Rationale: Input value of investment.

IOOI Rating: Input/Output



C19-9

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Do you have a policy or a strategy to provide and manage safe virtual spaces to staff, including guidance around cyber security and around remote and virtual working best practice. (Provide strategy or policy document).

Measurement

Unit: Y/N - Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Description: Policy or a strategy to provide and manage safe virtual spaces to staff, including guidance around cyber security and around remote and virtual working best practice.

Unit Guidance: Y/N (Provide documents).

Target Guidance: Specify whether you have a policy or strategy to provide safe virtual spaces to staff, including guidance around cyber security and around remote and virtual working best practice. Examples could include but are not limited to: Building, expanding and streamlining company online capabilities and capacities (e.g. using MSTeams, Zoom, Teamviewer etc. for safe internal communication). Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following link:

Evidence Requirements: Provide relevant documents.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



C19-10

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Initiatives to provide and manage safe virtual spaces to staff, including guidance around cyber security and around remote and virtual working best practice. (Provide initiatives' description).

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Initiatives to provide and manage safe virtual spaces to staff, including guidance around cyber security and around remote and virtual working best practice.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources.

Target Guidance: Summarise initiatives for providing safe virtual spaces to staff, including guidance around cyber security and around remote and virtual working best practice. Examples could include but are not limited to: Building, expanding and streamlining company online capabilities and capacities (e.g. using MSTEams, Zoom, Teamviewer etc. for safe internal communication). Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: NCSC Home Working Guidance (<https://www.ncsc.gov.uk/guidance/home-working>).

Evidence Requirements: Provide description of the initiatives including aims, audiences and delivery responsibilities, alongside details of organisations you may have partnered with. Please provide a report of implementation for the reporting period.

Technical Proxy Rationale: Input value of investment.

IOOI Rating: Input/Output



C19-11

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Initiatives to further support staff delivering essential work as defined by the UK government, both within the company and the supply chain (e.g. providing food delivery and mental health support services, etc.).

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Applies to own and supply chain essential workers, as outlined by UK Government (see e.g.: <https://www.gov.uk/government/publications/coronavirus-covid-19-maintaining-educational-provision/guidance-for-schools-colleges-and-local-authorities-on-maintaining-educational-provision>).

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources.

Target Guidance: Summarise initiatives for supporting staff delivering essential work as defined by the UK government, both within the company and the supply chain. This measure focusses on support beyond legal requirements, such as providing food delivery, mental health support or equivalent services to workers defined as essential by the UK government. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged.

Evidence Requirements: Provide description of the initiatives including aims, target beneficiaries and delivery responsibilities, alongside details of organisations you may have partnered with. Please provide a report of implementation for the reporting period.

Technical Proxy Rationale: Input value of investment.

IOOI Rating: Input/Output



C19-12

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Initiatives to further support own and supply chain staff from vulnerable groups to reduce economic impact of the crisis (e.g. offering financial support measures, advise on how to access support from the government, pro bono food deliveries and mental health support services, etc).

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Further support for own and supply chain staff.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources.

Target Guidance: Summarise initiatives for supporting staff within your company or supply chain that belongs to a vulnerable group (e.g. people with relevant health conditions), to reduce the economic impact of the crisis. Support can include but is not limited to: Offering financial support measures, advice on how to access support from the government, pro bono food deliveries and mental health support services, or equivalent services. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following link: UK Government COVID-19 guidance for employees, employers and businesses (<https://www.gov.uk/government/publications/guidance-to-employers-and-businesses-about-covid-19>).

Evidence Requirements: Provide description of the initiatives including aims, target beneficiaries and delivery responsibilities, alongside details of organisations you may have partnered with. Please provide a report of implementation for the reporting period.

Technical Proxy Rationale: Input value of investment.

IOOI Rating: Input/Output



C19-13

Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Supporting workers, SMEs and VCSEs to face the COVID-19 crisis

Measure: Percentage of contractors engaged with to implement COVID-19 response measures as outlined in the TOMs 2020 COVID-19 Plug-In and contract management notes.

Measurement

Unit: % of contractors within the contract's supply chain

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Percentage of supply chain contractors engaged to deliver C19 TOMs Measures or equivalent.

Target Guidance: Summarise the share of contractors engaged with to implement COVID-19 response measures as outlined in the TOMs 2020 COVID-19 set of Measures and contract management notes. Examples include but are not limited to: Providing guidance and information around COVID-19, best practice social behaviour, etc. to contractors and their staff. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged.

Evidence Requirements: Provide details of supply chain partners that have committed to deliver C19 Measures or equivalent.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



Social Value
Portal



Social

Healthier, safer and more resilient communities



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT25, NT26, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at reducing crime (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe what type of crime/s you aim to reduce, including how and where you aim to do so. Details of any organisations you will partner with to reduce crime must be provided.

Evidence Requirements: Provide a breakdown of pounds invested in initiatives aimed at reducing crime (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe what type of crime you have aimed to reduce, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR). Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combine with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT26, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at tackling homelessness (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe how you aim to tackle homelessness, including how and where you aim to do so. Details of any organisations you will partner with to tackle homelessness must be provided.

Evidence Requirements: Provide a breakdown of pounds invested in initiatives aimed at tackling homelessness (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17), and of any organisations you have partnered with. Describe how you have worked to tackle homelessness, including how and where you have aimed to do so. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combined with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT29, NT30 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent pound value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at tackling rough sleeping (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the initiatives to support rough sleepers you are planning to deliver. Details of any organisations you will partner with to tackle rough sleeping must be provided.

Evidence Requirements: Provide a breakdown of pounds (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at tackling rough sleeping, and of any organisations you have partnered with. Describe how you have worked to tackle rough sleeping, including how and where you have aimed to do so. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combined with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan to describe how the initiatives will be delivered. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be considered (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at improving health and/or wellbeing in the community (including the number of staff hours valued at £16.09 per hour, i.e. the general value for volunteering (NT17)). Describe the type of health and/or wellbeing issue(s) you will address, including how and where you aim to do so. Provide details of any organisations you intend to partner with to deliver the initiatives.

Evidence Requirements: Provide a breakdown of the amount (£) to be invested in initiatives aimed at improving health and/or wellbeing in the community (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the type of health and/or wellbeing issues you have addressed, including how and where you have done so. Provide details of your initiatives and any organisations you have partnered with. Where an additional multiplier has been added at Measurement because of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output



NT27

Theme: Social – Healthier, Safer and more Resilient Communities

Outcome: Vulnerable people are helped to live independently

Measure: Initiatives to be taken to support older, disabled and vulnerable people to build stronger community networks (e.g. befriending schemes, digital inclusion clubs).

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of £ value to be invested in initiatives aimed at supporting older, disabled and vulnerable people to build stronger community networks (including the number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the group(s) you will be supporting and the activities you will deliver, including how and where you will do so. Details of any organisations you will partner with must be provided.

Evidence Requirements: Provide a breakdown of £ value (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at supporting older, disabled and vulnerable people to build stronger community networks. Describe the groups you have supported and the activities you have delivered, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output



Measurement

Unit: £ value

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be a cash donation or the equivalent value of in-kind contributions - e.g. donating a van to a community organisation - that have been made for a specific community project. The focus of this Measure is a direct provision of support to specific community projects, rather than a more general support for organisations such as VCSE. Equivalent £ value should be calculated and assumptions and details about the calculation should be made explicit. Attribution might need to be taken into account where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the toolkit guidance document for worked examples on attribution. This Measure should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: £ donated (or equivalent value in £)

Target Guidance: Provide a breakdown of the pound equivalent value of donations and/or in-kind contributions that will be donated to local community projects. Describe the local community projects you will support. Provide details of any organisations you will partner with.

Evidence Requirements: Provide a breakdown of the pound equivalent value of donations and/or in-kind contributions donated to local community projects. Describe the local community projects you have supported. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with General Data Protection Regulations (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output



Measurement

Unit: No. staff volunteering hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. Volunteering is defined by the International Labour Organisation (2001) as ‘unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household’. Here staff volunteering hours should only be recorded when time has been allocated for staff to spend on formal volunteering (not for family and friends). In the case of local community projects there might not be a community organisation at the receiving end of the volunteering, but it might be an initiative set up by the company itself based on local intelligence. Time invested in organising such activities must be recorded in this category on top of the staff volunteering time itself. Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with by the employees (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: For example, if 10 staff will volunteer 3 hours each, then the total number of hours reported should be 30.

Target Guidance: Describe the volunteering activity/ activities to be delivered and the local community projects to be supported. Provide details of any organisations you will partner with. Provide a breakdown of staff volunteering hours to be delivered to local community projects. Only regular work hours and overtime hours can be counted as volunteering hours. For example, if 10 staff will volunteer 3 hours each, then the total number of hours reported should be 30.

Evidence Requirements: Describe the volunteering activity/activities you have delivered and the local community projects you have supported. Provide details of any organisations you have partnered with. Provide a breakdown of staff volunteering hours delivered to local community projects. Only regular work hours and paid overtime hours can be counted as volunteering hours. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering activity. It is the ONS hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. A Community Charter is a document designed by the community that identifies the needs and opportunities, and directs businesses that can help towards specific deliverables. This could be provided through funding of a local community coordinator or a third party to facilitate the process. Supporting a local community coordinator means agreeing to be a sponsor and sign up to the initiatives, e.g. by directing staff volunteers towards them. This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT29, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in helping the local community draw up their own Community Charter or Stakeholder Plan (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe your strategy/workplan for engaging with the local community. Provide details of any organisations you will partner with.

Evidence Requirements: Provide a breakdown of pounds invested to help the local community draw up their own Community Charter or Stakeholder Plan (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Provide a copy of the Community Charter or the Stakeholder Plan and details of any organisations you have partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output



C19-14

Theme: Social – Healthier, Safer and more Resilient Communities

Outcome: Supporting communities to deal with the COVID-19 crisis

Measure: Do you have in place a comprehensive strategy to provide guidance on best practice social interaction at work in COVID-19 times to own and supply chain staff?

Measurement

Unit: Y/N – Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: A strategy could specify the main objective and audiences as well as the scope of the guidance, distribution channels and delivery or enforcement responsibilities.

Unit Guidance: Provide documents, links to or description of the strategy.

Target Guidance: Specify whether you have in place a strategy to provide guidance on best practice social behaviour around COVID-19 to own and supply chain staff. Examples include but are not limited to: Regular emails to own and where possible supply chain staff informing them on best practice social behaviour at work and at home. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: UK Government COVID behavioural guidance (<https://www.gov.uk/government/collections/coronavirus-covid-19-list-of-guidance>); UK Government behaviour at work guidance poster (https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/873785/COVID19_Guidance_Employers_and_businesses_.pdf); UK Government social distancing recommendations (<https://www.gov.uk/government/publications/covid-19-guidance-on-social-distancing-and-for-vulnerable-people/guidance-on-social-distancing-for-everyone-in-the-uk-and-protecting-older-people-and-vulnerable-adults>).

Evidence Requirements: Please provide documents detailing your strategy and a report of its implementation (how it has been distributed, monitored or enforced, how you have engaged with target audiences etc).

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



C19-15

Theme: Social – Healthier, Safer and more Resilient Communities

Outcome: Supporting communities to deal with the COVID-19 crisis

Measure: Enable and encourage staff on the contract to safely volunteer within their community or participate in local support networks - particularly to help people in most vulnerable groups (at risk categories), people self-isolating and local essential workers.

Measurement

Unit: No. staff volunteering hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is an allowance of (paid) time for staff on the contract to spend volunteering with different forms of organised support for people in their own community to cope with the challenges of the crisis (e.g. joining their own local network to support vulnerable individuals, people that cannot go shopping and are struggling to get groceries, people that in need of social interaction, etc.). You can alternatively use measure C-19-16 (which captures help for people self-isolating or volunteering through specific programmes) to record volunteering time as long as you don't double count with hours recorded under this measure. Qualifying activities have to be specified.

Unit Guidance: Cumulative allowance of paid hours for staff on the contract. Please do not double count with C19-16.

Target Guidance: Summarise your strategy for enabling and encouraging staff to volunteer within the community or participate in local support networks. This measure focuses particularly on help for the most vulnerable groups and essential work force. Examples include but are not limited to: NHS volunteering, community support group volunteering, digital volunteering to help vulnerable groups, etc. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: Goodsam - NHS volunteer responder (<https://www.goodsamapp.org/NHSvolunteerresponders>); Covid-19 Mutual Aid UK - network and lists of community support initiatives focussed on COVID response (<https://covidmutualaid.org/>); Silverline - telephone support for old people (<https://www.silverline.org.uk/what-we-do/>); Protecting most vulnerable guidance: <https://www.gov.uk/government/publications/guidance-on-shielding-and-protecting-extremely-vulnerable-persons-from-covid-19/guidance-on-shielding-and-protecting-extremely-vulnerable-persons-from-covid-19>.

Evidence Requirements: Describe the volunteering activity/activities that you have specified as qualifying in your allowance for staff, and if available the support they have provided, including details of organisations they have volunteered with. Only regular work hours and paid overtime hours can be counted as volunteering hours. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering activity. It is the ONS hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



C19-16

Theme: Social – Healthier, Safer and more Resilient Communities

Outcome: Supporting communities to deal with the COVID-19 crisis

Measure: Direct support from your organisation to local authorities or VCSEs in the local area for the contract to deliver the services to support people in most vulnerable groups (at risk categories), people self-isolating and local essential work force - (Food delivery, mental health support, etc.).

Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is the overall value of resources invested in initiatives to support programmes of organisations in the local area for the contract that are tackling the emergency (NHS, local authorities, charities and other third sector organisations) particularly supporting the identified categories. This Measure is designed to identify and value commitments made at organisational level rather than staff volunteering in their own communities (C19-15). Please do not double count staff volunteering time (C19-15) and do not claim the same initiatives (value) across multiple contracts in the same area (if you do have multiple contracts that are implementing the same local initiatives please attribute a share of the overall value to each contract).

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources. Please do not double count staff volunteering time (C19-15) and do not claim the same initiatives (value) across multiple contracts in the same area (if you do have multiple contracts that are implementing the same local initiatives please attribute a share of the overall value to each contract).

Target Guidance: Specify initiatives for supporting local authorities or VCSEs with delivering services to support people isolating in the local area for the contract. These services could include but are not limited to: food delivery, mental health support or equivalent measures. Examples include but are not limited: Donating resources to NHS or encouraging staff to volunteer during paid work hours . Given the current crisis situation it is encouraged to be innovative and engage with creative and best practice solutions. Examples for innovative and best practice solutions can be accessed through the following links: Goodsam - NHS volunteer responder (<https://www.goodsamapp.org/NHsvolunteerresponders>); Age UK: <https://www.ageuk.org.uk/scotland/information-advice/health-and-wellbeing/coronavirus/>

Evidence Requirements: Please provide a breakdown or report of the organisations and programmes supported within the contract's local area. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input value of resources.

IOOI Rating: Input / Output



C19-17

Theme: Social – Healthier, Safer and more Resilient Communities

Outcome: Supporting communities to deal with the COVID-19 crisis

Measure: Funding for campaigns targeted towards staff and the general public to increase the understanding, recognition and appreciation of the social value provided by essential services (NHS, food retail, transportation, etc.) and the importance of following behavioural norms, as specified by the government and public health institutions.

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be campaigns directly organised or supported for own and supply chain staff or communities that are local to the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources.

Target Guidance: Summarise information and campaigns you provided to increase the understanding, recognition and appreciation of the social value provided by essential services (NHS, food retail, transportation, etc.) among own or supply chain staff and the general public. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: Clap for our carers (<https://clapforourcarers.co.uk/>) - a campaign to raise awareness and appreciation for NHS staff during the current crisis; Campaigns resources from Public Health England: <https://campaignresources.phe.gov.uk/resources/campaigns/101-coronavirus-/resources>

Evidence Requirements: Please provide description and references to the campaign organised or funded, a list of any organisations you might have partnered with and a breakdown of resources invested.

Technical Proxy Rationale: Input value of investment.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be any initiatives for redesigning spaces aimed at reducing covid risks and impacts for work and staff. Initiatives captured have to provide information on the specific covid risks and impacts they aim to address. Relevant initiatives are also expected to go beyond regulatory requirements, meaning they provide an additional to the BAU scenario. Attribution should be applied where appropriate, to account for wider impacts of any initiatives. Examples could include but are not limited to: Improving capacities and availability for COVID risk reducing hygiene options, redesigning office spaces to allow for safe and socially distanced work. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: Croner-i article on proposed innovative measures to address COVID related risks and impacts for the workplace (<https://app.croneri.co.uk/feature-articles/creating-distance-redesigning-office-coronavirus-safety>); IWFM COVID-19 guidance: returning to work (<https://www.iwfm.org.uk/coronavirus-resources/covid-19-guidance-returning-to-work.html>)

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources

Target Guidance: Summarise initiatives for redesigning spaces to address any COVID related risks and impacts on work and staff. Examples could include but are not limited to: Improving capacities and availability for COVID risk reducing hygiene options, redesigning office spaces to allow for safe and socially distanced work. Given the current crisis situation, innovation, creativity and best practice solutions are encouraged. Examples for innovative and best practice solutions can be accessed through the following links: Croner-i article on proposed innovative measures to address COVID related risks and impacts for the workplace (<https://app.croneri.co.uk/feature-articles/creating-distance-redesigning-office-coronavirus-safety>); IWFM COVID-19 guidance: returning to work (<https://www.iwfm.org.uk/coronavirus-resources/covid-19-guidance-returning-to-work.html>)

Evidence Requirements: Provide description of the initiatives including aims, target beneficiaries and delivery responsibilities, alongside details of organisations you may have partnered with. Please provide a report of implementation for the reporting period.

Technical Proxy Rationale: Input value of investment.

IOOI Rating: Input / Output



Social Value
Portal



Environment

Decarbonising and safeguarding our world



Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year; Target emissions (tonnes of CO₂e) – (not reduction); Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: RE37, RE37a, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Technical Guidance

Definition: These could result, for example, from a deliberate programme aimed at changing processes or from de-carbonisation work. This category does not include transport related savings resulting from car miles saved (e.g. cycling to work or carpooling initiatives for employees - NT32) or from low emission vehicles - NT33. Reduction should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. Should not be double counted with NT32 and NT33 or RE37, Re37a, RE39 or RE39a.

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for the evidencing of the savings recorded through the main unit.

Target Guidance: Describe the programmes or initiatives that you are going to put in place to achieve the identified savings in CO₂ emissions on the contract against the specified baseline, including timeframes. These could be from de-carbonisation work (other than transport initiatives that can be measured elsewhere). Specify and evidence the baseline level of emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”). While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

[See Next Page](#)



Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) – (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: RE37, RE37a, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Target Guidance (continued): In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Carbon reductions should be evidenced through an independent and verifiable process (e.g. Planet Mark Certification or equivalent). There is an expectation for independently assured and audited reports to be provided. Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. “(...) the economic cost of mitigating a unit cost of carbon”, to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2018) and BEIS’s DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact



Measurement

Unit: Yes, Net zero before or by 2030

Additional Metrics: Yes, Net zero by 2040;
Yes, Net zero by 2050

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: At corporate level this will be your existing policy, strategy and/or plan of action to achieve, evidence and monitor net zero carbon. If you have not issued one yet, but are committing to do, please provide a statement including scope and expected publication date.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction to qualify as social value measures in the TOMs. We adopt the minimum target identified by the UN, the UK Government, and the scientific community: net zero carbon by 2050 (namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 - “NZC 2050”). While the TOMs adopt this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050. These are strongly encouraged especially for sectors where this is becoming more common.

Unit Guidance: Provide relevant documents and specify the set target for reaching Net Zero Carbon.

Target Guidance: At corporate level, this will be your existing policy, strategy and/or plan of action to achieve, evidence and monitor net zero carbon for the specified date. If you have not issued one but are committing to do so, please provide a statement including scope and expected publication date. This includes outlining and explaining set targets.

Evidence Requirements: Please provide a copy of your policy, strategy, and plan with specific milestones to achieve, evidence and monitor net zero carbon for the specified date.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Technical Guidance

Definition: Monetary contributions to offset equivalent tonnes of carbon, where carbon cannot be reduced within the contract's timeframe. Explanation on why carbon emissions cannot be reduced during contract timeframe has to be provided.. For further guidance on target setting and related baselining please see the provided Target Guidance.

Unit Guidance: Contributions should be calculated based on the tonnes CO₂e and multiplied by the per tonne value of carbon adopted on the fund. CO₂e savings refer to CO₂ equivalent emissions savings.

Target Guidance: List carbon offset contributions made into own fund or funds managed by certified external providers , providing a breakdown for the different types of offsetting and an explanation of why said carbon cannot be reduced within the contract's timeframe, Please provide information on the conversion rate used (price of CO₂e applied per tonne).
Offsetting should always be a secondary option to be implemented only once reduction of emissions and direct decarbonization cannot be reasonably achieved. In practice, this 'reasonableness' requirement which is incorporated within the Evidence Requirements for those measures will always be relative to the context of the project and will be the subject of professional judgement. As for other measures within the TOMs, the expectation is that organizations will use these measures to showcase genuine progress as opposed to pushing the envelope to inflate their social value reports. Evidence collection, verification and auditing play an important role in ensuring the right process is set up to create meaningful and transparent social value reports.

Evidence Requirements: List contributions to offset carbon made on the contract into own fund or with certified external providers, providing a breakdown for the different types of offsetting and an explanation of why said carbon cannot be reduced within the contract timeframe, as specified in the Target Guidance.

Technical Proxy Rationale: Monetary contributions to offset carbon emissions. £ value should be linked to the tonnes of CO₂e being offset and the value of carbon chosen for the calculation.

IOOI Rating: Input

Measurement

Unit: Y/N - Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: See Planet Mark (<https://theplanetmark.com/certification/>), Carbon Trust (Carbon Neutral Certification, Carbon Standard - <https://www.carbontrust.com/client-services/certification/assurance-certification/>) or equivalent.

Unit Guidance: Provide relevant documents or name the certificate you planned to achieve for the current year.

Target Guidance: List certifications achieved or to be achieved for the reporting year.

Evidence Requirements: Provide achieved certifications and documentation on how these have been achieved.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

Measurement

Unit: Miles saved

Valuation

Proxy: £0.02

Value for the Individual: (0%)

Value for the Government: £0.01 (54.01%)

Value for the Community: £0.01 (45.99%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Technical Guidance

Definition: These benefits are expected to be delivered as a result of transport programmes. Provide detail on different programmes including how passenger car miles have been saved, and figures that have been used as benchmarks. There is an expectation for independently assured and audited reports to be provided. Miles can be saved on contract or through direct contract related commuting / travel. Reasonable assumptions have to be made and evidenced regarding the reduction of car miles travelled. This measure can be localized if desired, which can lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Unit Guidance: Car miles (not hundreds of miles) saved against baseline, which must be provided.

Target Guidance: Provide details on the programme to be implemented to reduce passenger car miles driven, including a breakdown of the number of car miles to be saved and how the car miles will be saved. Specify the baseline to be used (i.e. car miles driven before a programme is put in place to reduce car miles driven) and full methodology of calculation. This measure can be localized if desired, which can lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Evidence Requirements: Provide details of the corporate green transport programme implemented to reduce passenger car miles driven, including a breakdown of the number of car miles saved and how they have been saved. Specify the baseline that is used (i.e. car miles driven before a programme was put in place to reduce car miles driven) and full methodology of calculation.

Technical Proxy Rationale: Carbon cost of CO₂ emissions and social cost (including health costs) of PM2.5 and NOx for emissions from road transport by cars (ref. fleet 2019). The Carbon cost is from DfT's WebTAG guidance and based on estimated abatement costs that will need to be incurred in order to meet specific emissions reduction targets ((HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS's DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>). The social cost based on DEFRA Damage Cost Approach (DCA) and monetised. Updated to 2020 prices. The value has changed from 2020 due to updates to the pollution costs published by DEFRA, providing more accurate measurement of costs occurring as a result of NOx and PM2.5 emissions.

IOOI Rating: Outcome / Impact

Measurement

Unit: Miles driven

Valuation

Proxy: £0.01

Value for the Individual: (0%)

Value for the Government: £0.01 (38.21%)

Value for the Community: £0.01 (61.79%)

Reporting

Social Value

Technical Guidance

Definition: These benefits are expected to be delivered as a result of transport programmes. Examples of evidence would be fleet reports or mileage logs. There is an expectation for independently assured and audited reports to be provided.

Unit Guidance: No. miles driven on contract on LEV as part of a specific sustainable transport programme

Target Guidance: Provide details on the programme to be implemented. When in addition to data on the miles driven additional data on the location is collected, this measure can further be localized if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localisation of this Measure.

Evidence Requirements: Fleet report and mileage log. There is an expectation for independently assured and audited reports to be provided.

Technical Proxy Rationale: CO₂, PM2.5 and NO_x emissions saved by Low Emission Vehicles (LEV) (defined by emissions <75mg/km). Carbon cost of CO₂ emissions and social cost (including health costs) of PM2.5 and NO_x for emissions from road transport by cars (ref. fleet 2019). The Carbon cost is from DfT's WebTAG guidance and based on estimated abatement costs that will need to be incurred in order to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS's DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>). The social cost based on DEFRA Damage Cost Approach (DCA) and monetised. Updated to 2020 prices.

IOOI Rating: Outcome / Impact

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: These sustainable transport incentivisation schemes for employees can include but are not limited to: subsidies for use of public transport, cycle buying scheme, cycle infrastructure provision such as storage, corporate carpooling options and incentivisation, corporate bus service, etc.

Unit Guidance: Provide information to describe corporate travel scheme available to employees.

Target Guidance: Summarise the nature of your corporate travel scheme and your strategy for providing access to it. This can include but is not limited to subsidies for use of public transport, cycle buying scheme, cycle infrastructure provision such as storage, corporate carpooling options and incentivization, corporate bus service.

Evidence Requirements: Provide information on the corporate travel scheme that has been implemented. This could be proof of a public transport subsidy or cycle subsidy scheme (expenditure or corporate policy documents); proof of cycle infrastructure (e.g. storage layout); proof of employee carpooling incentivisation and/or corporate bus service (corporate documents). Report the number of staff that have benefited from the different initiatives on the scheme.

Technical Proxy Rationale: Recorded, not monetised. This indicator measures employee incentivisation to make use of sustainable transport options, as described in the Definition. (These can include but are not limited to: subsidies for use of public transport, cycle buying scheme, cycle infrastructure provision such as storage, corporate carpooling options and incentivization, corporate bus service, etc.).

IOOI Rating: –

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: % of the fleet used on contract that comply with EURO 6 emissions standards (including all sub-categories of EURO 6) or are LEV (Low Emission Vehicles such as electric or hybrid). This includes passenger cars, light commercial vehicles and heavy trucks.

Unit Guidance: (Number of EURO 6 and LEV vehicles used on contract) / Total number of vehicles used on contract) * 100 to arrive at a percentage.

Target Guidance: Provide information on the % of the fleet planned to be used directly on contract that comply with EURO 6 emissions standard or are LEV (Low Emission Vehicles such as electric or hybrid). The fleet includes passenger cars, light commercial vehicles and heavy trucks.

Evidence Requirements: Provide information on the % of the fleet used directly on contract (this excludes employee commuting) that complies with EURO 6 emissions standards or are LEV (Low Emission Vehicles such as electric and hybrid). The fleet includes passenger cars, light commercial vehicles and heavy trucks.

Technical Proxy Rationale: Record, not monetised. This indicator measures progress towards fleet modernization with the goal of reduced air pollutant emissions.

IOOI Rating: Outcome / Impact

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Fleet emissions monitoring programme on the contract including collection of data for each vehicle used on contract. Per vehicle used it is necessary to collect data on: distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localisation of this measure.

Unit Guidance: Upload description of your data collection programme, confirming that you will collect data on each vehicle used on the contract. Per vehicle used it is necessary to collect data on: distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d).

Target Guidance: Please describe your plan for collecting data on each vehicle expected to be used on contract, including expected distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2,

EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Evidence Requirements: Breakdown of travel data for each vehicle used directly on contract (including by contractors), including distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/guidance/air-quality-economic-analysis>. Please reach out to SVP if you have further questions regarding the localisation of this measure.

Technical Proxy Rationale: Recorded, not monetised. Data collection programme - can be monetised through a bespoke Measure, provided all data has been collected. Emissions savings are generated through the use of a modern low emissions vehicle fleet versus a baseline vehicle fleet.

IOOI Rating: –

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: These are donations or investments attributable to the contract geared towards environmental and biodiversity conservation and towards sustainable management projects for both marine and terrestrial ecosystems.

Unit Guidance: £ invested attributable to the contract.

Target Guidance: Provide a list of donations and projects to be supported on the contract, together with anticipated impacts and an explanation of the Monitoring and Evaluation processes to be put in place.

Evidence Requirements: Provide a list of donations and projects supported on the contract, together with information on what the anticipated impacts were and an explanation of the Monitoring and Evaluation processes that were put in place for each programme.

Technical Proxy Rationale: Input value – record investments. Can be combined with an independently calculated impact multiplier if a dedicated impact assessment has been carried out.

IOOI Rating: Input

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: These are donations or investments attributable to the contract. Reforestation or afforestation initiatives must be designed by experts to take into account, among other aspects, placement on different types of land, alternative use, climate change effects, biodiversity implications, etc.

Unit Guidance: £ invested attributable to the contract

Target Guidance: Provide a list of donations and projects to be supported on the contract, together with anticipated impacts and an explanation of the monitoring and evaluation processes to be put in place. Specify a list of areas expected to be impacted by the reforestation or afforestation projects.

Evidence Requirements: Provide a list of donations and projects supported on the contract, together with information on what the anticipated impacts were and an explanation of the monitoring and evaluation processes that were put in place for each programme. Specify or list areas that were directly impacted by the reforestation or afforestation projects.

Technical Proxy Rationale: Input value – record investments. Can be combined with an independently calculated impact multiplier if a dedicated impact assessment has been carried out.

IOOI Rating: Input

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: % of plastic used on the contract that is recycled.

Unit Guidance: (Plastics used on the contract that are recycled (tonnes) / total plastic used on the contract (tonnes)) * 100 to arrive at a percentage.

Target Guidance: % of plastic used on the contract that is expected to be recycled.

Evidence Requirements: Provide a breakdown of the total amount of plastic used on the contract and the total amount of that that has been recycled.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (e.g. financial advice / legal advice / HR advice / HSE) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs). Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. Please note that MSMEs are defined as (0-250 employees) - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT29, NT30 and NT63 or other relevant Measures.

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice to support VCSEs/MSMEs to adopt circular economy solutions. Provide the names of the VCSEs/MSMEs you will support or a range of options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the names of the VCSEs/MSMEs you have supported. Specify the number of expert staff hours spent with each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advice/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output

 **Measurement**

Unit: Kilos

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

 **Technical Guidance**

Definition: These are benefits resulting from a plastic packaging substitution programme, and they would include either solutions that substitute plastic packaging with alternatives that have been demonstrated to be more sustainable (i.e. with an overall lower carbon footprint and not leading to collateral pollution issues) over the course of their lifecycle, or "milkman" type schemes where products are delivered in reusable packaging as opposed to single use (options are currently set to be launched in some UK markets in 2020 by different providers).

Unit Guidance: Kilos of plastic packaging use reduced.

Target Guidance: Kilos of plastic packaging to be replaced on the programme, and description of the sustainability analysis comparing the original options to the chosen alternatives. In the case of "milkman schemes", description of the scheme and intended impact.

Evidence Requirements: Report of the programme with a description of the sustainability analysis comparing the original options to the chosen alternatives. In the case of "milkman schemes", description of the scheme and intended impact.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Circular economy refers to an economic system that aims to eliminate waste through the continual use and re-use of resources. Spend on (or equivalent value of) goods and services provided by organisations through local partnerships to implement circular economy solutions.

This can include but is not limited to: ground coffee waste used for landscaping or repurposed, outdated technological equipment repurposed in local VCSEs, discarded furniture, uniforms or similar to be repurposed by local VCSEs.

Unit Guidance: The value of the goods and services planned to be requested through local partnership for a circular economy and for each detail spend or equivalent estimated value (where pro bono).

Target Guidance: Provide a list of goods and services to be requested through local partnerships for a circular economy and for each either detail the spend or the equivalent estimated value (i.e. if it is pro bono). Provide evidence on the circular economy aspect of the goods and services to be consumed.

Evidence Requirements: Provide a list of organisations you have partnered with and for each a breakdown of goods and services that were requested through local partnerships for a circular economy. For each category of items, either detail the spend or the equivalent estimated value (i.e. if it is pro bono). Provide evidence on the circular economy aspect of the goods and services consumed.

Technical Proxy Rationale: Input value - spend with local organisations on partnerships to implement circular economy solutions.

IOOI Rating: Output

Measurement

Unit: Tonnes

Valuation

Proxy: £96.70

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £96.70 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Hard to recycle waste can include, but is not limited to: cigarette butts, wrappers, cosmetic product packaging including different types of plastics. For examples of relevant programmes see Terracycle, or equivalent. (https://www.terracycle.com/en-GB/zero_waste_boxes; https://www.terracycle.com/en-GB/about-terracycle/pre_consumer_programs).

Unit Guidance: Tonnes of waste that would not be recycled through standard recycling but that have been diverted to a dedicated recycling programme.

Target Guidance: Calculate the estimated tonnes of waste that would not be recycled through standard recycling but that will be diverted to a dedicated recycling programme because of your programme or partnership. Provide information on the nature of the waste to be recycled to evidence the nature of recycling difficulties.

Evidence Requirements: Report the total amount of hard to recycle waste on the contract that has been diverted through a dedicated recycling programme. Provide details of any partner organisations on the contract for the programme. Provide information on the nature of the waste recycled to evidence the nature of recycling difficulties.

Technical Proxy Rationale: Standard Landfill rate.

IOOI Rating: Outcome

Measurement

Unit: % of contracts

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: List requirements and contracts where applied.

Unit Guidance: (Total contracts including relevant commitments / total contracts) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of procurement contracts on the contract, and the total number of contracts that will include sustainable procurement commitments on the contract. Provide a copy of your sustainable procurement policy or an equivalent statement.

Evidence Requirements: Specify the total number of procurement contracts on the contract and the total number of contracts that have included sustainable procurement commitments on the contract. Provide a copy of your sustainable procurement policy or equivalent statement.

Technical Proxy Rationale: Recorded, not monetised. Indicator can be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: % of contracts

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: List requirements and contracts where applied.

Unit Guidance: (Total contracts including relevant commitments / total contracts) * 100 to arrive at a percentage.

Target Guidance: Specify the expected total number of contracts with the supply chain on this contract that require contractors to operate low or zero emission vehicles and the total number of contracts with the supply chain on this contract.

Evidence Requirements: Specify the total number of contracts with the supply chain on this contract that require contractors to operate low or zero emission vehicles and the total number of contracts with the supply chain on this contract. Provide evidence for the contractual requirements for contractors to operate low or zero emission vehicles as implemented in contracts.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: Y/N - Provide Certification

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: See Carbon Trust Standard for Supply chain or equivalent (https://www.carbontrust.com/client-services/certification/carbon-trust-standard/?kw+=carbon-certificates-Broad&gclid=EAlalQobChML_ISkqaCS5wIVhrHtCh0ChwyqEAAYASAAEgLXUvD_BwE).

Unit Guidance: Provide certification or a statement with certifications you are planning to achieve.

Target Guidance: Specify certifications you have achieved or are planning to achieve within the current year.

Evidence Requirements: Provide certifications you have achieved within the current year.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: For examples of relevant training and courses see SDG Academy courses (e.g. <https://sdgacademy.org/>) or the real estate sector on the Supply Chain Sustainability School (<https://www.supplychainschool.co.uk/>).

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 supply chain staff would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Training programmes on climate change and decarbonisation for all staff in the supply chain - sponsored for Micro and Small enterprises or required from contractors. Provide a description of what type of training you are requiring or supporting contractors to deliver to staff. Also provide the number of people receiving the training together with the overall duration.

Evidence Requirements: Provide details and evidence of what type of training has been delivered to staff in the supply chain (for Micro and Small enterprises), including number of people receiving the training together with the overall duration. If you have used online training please provide links and references, otherwise provide references to the training partner.

Technical Proxy Rationale: Economic benefits to Micro and Small enterprises resulting from avoided cost of expert advice/support. Based on average self-reported fees from a survey of consultants in various sectors, updated to UK 2020/2021 prices.

IOOI Rating: Output



C19-18

Theme: Environment
– Decarbonising and
Safeguarding our World

Outcome: COVID-19
environmental
response

Measure: Initiatives to provide or support appropriate collection for
discarded gloves and masks.

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: These are initiatives you have organised or contributed to, that where relevant, aim to properly collect and dispose of masks or gloves that have been disposed of and that can represent both a health and an environmental hazard.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour), materials, equipment or other financial and non-financial resources.

Target Guidance: Summarise initiatives to provide or support appropriate collection for discarded gloves and masks. Examples include but are not limited to: Coordinating or managing waste collection or disposal system for gloves and masks. Given the current crisis situation, innovation and engagement with creative and best practice solutions are encouraged.

Evidence Requirements: Please provide description and references to the initiatives organised or funded, a list of any organisations you might have partnered with and a breakdown of resources invested.

Technical Proxy Rationale: Input value of investment.

IOOI Rating: Input/Output



**Social Value
Portal**



Innovation

Promoting social innovation



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to promote local skills and employment to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment, or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations that you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT14.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to promote and support responsible business to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT15.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to enable healthier, safer and more resilient communities to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see NT16.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to safeguard the environment and respond to the climate emergency to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT17.


IOOI Rating: Input / Output






**Social Value
Portal**


Real Estate

Plug-In Measurement Framework

Theme	Outcome	Real Estate		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Jobs Promote Local Skills and Employment</p>	More local people in employment	RE1	✓	No. of local direct employees (FTE) hired or retained (for re-tendered contract) on contract
		RE1a	✓	No. residents (FTE) employed from listed sub-localities (direct/supply chain)
		RE1b	✓	No. of local people (FTE) on contract employed through the supply chain
		RE2	✓	Percentage of local employees (FTE) on contract
		RE3	✓	£ invested in employer's fairs held to encourage local employment in the area
	More opportunities for disadvantaged people	RE4	✓	No. of employees (FTE) hired on contract who are long term unemployed (1+ yr)
		RE5	✓	No. of employees (FTE) hired on the contract who are NEETs
		RE6	✓	No. of 18+ rehabilitating or ex-offenders (FTE) hired on the contract
		RE7	✓	No. of disabled employees (FTE) hired on the contract
		RE8	✓	No. of hours supporting unemployed people into work (24 yo+)
		RE57	✓	Percentage of women (FTE) hired on the contract
		RE58	✓	Percentage of employees (FTE) BAME hired on the contract
	Improved skills	RE71	+	Specific initiatives/recruitment programmes for women run for the contract (Y/N)
		RE72	+	Specific initiatives/recruitment programmes for BAME run for the contract (Y/N)
		RE9	✓	No. of staff hours spent on local school and college visits (inc. prep. Time)
		RE10	✓	No. site visits for school children or local residents
Improved employability of young people	RE11	✓	No. of weeks of training opportunities on the contract - Level 2, 3 or 4+	
	RE12	✓	No. of weeks of apprenticeships on the contract - Level 2, 3 or 4+	
	RE13	✓	No. of hours dedicated to support young people into work (16-24 yo)	
	RE14	✓	£ invested in employment taster days (project related sector or industry)	
	RE15	✓	Weeks of meaningful work placements / pre-employment courses (students, 1-6 wks, unpaid)	
	RE16	✓	No. of weeks of meaningful paid work placements (6+ weeks, paid)	

Theme	Outcome	Real Estate		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Growth Supporting Growth of Responsible Regional Business</p>	More opportunities for local MSMEs and VCSEs	RE18	✓	No. hours of expert business advice to VCSEs and MSMEs
		RE18a	✓	No. hours helping VCSEs and MSMEs achieve net zero carbon by 2050 or before
		RE19	✓	Equipment or resources donated to VCSEs (£ equivalent value)
		RE20	✓	Number of voluntary hours to support VCSEs (excl. expert advice)
		RE21	✓	Meet the buyer events held to highlight local supply chain opportunities
		RE22	✓	Total spent in the LOCAL supply chain through the contract
		RE22a	✓	Total amount (£) spent through the contract in specified sub-localities
	Improving staff wellbeing and mental health	RE23	✓	Total amount (£) spent through the contract with LOCAL MSMEs
		RE73	+	No. opps. for local MSMEs to respond to tenders for de-carbonisation work
		RE24	✓	No. employees provided access to multidimensional wellbeing programmes
	Ethical Procurement is promoted	RE25	✓	Equality, diversity and inclusion training for staff & supply chain
		RE59	✓	No. of employees provided with support for anxiety/depression (Construction)
	Social Value embedded in the supply chain	RE26	✓	Percentage of procurement contracts including commitments to ethical procurement
		RE60	✓	Percentage of invoices on the contract paid within 30 days
 <p>Social Healthier, Safer and more Resilient Communities</p>	Crime is reduced	RE27	✓	Percentage of supply chain contracts with social value commitments, measurement & monitoring
	Creating a healthier community	RE28	+	Initiatives aimed at reducing crime
		RE29	+	Initiatives to be taken to tackle homelessness
	Vulnerable people are helped to live independently	RE30	✓	Initiatives to engage the community in health or wellbeing initiatives
		RE31	✓	Initiatives to support older, disabled and vulnerable with community networks
	More working with the Community	RE32	✓	Donations or in-kind contributions to local community projects (£ & materials)
		RE33	✓	No. of hours volunteering time provided to support local community projects
RE34		✓	Support local community draw up their own Community Charter/Stakeholder Plans	
Our Occupiers are more satisfied	RE35	+	Occupier satisfaction score (NPS)	
	RE36	+	Post Occupancy Evaluation has been carried out	

Theme	Outcome	Real Estate		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Environment Decarbonising and Safeguarding our World</p>	Carbon emissions are reduced	RE37	+	Carbon reductions via energy efficiency measures - building operations (REEB/baseline req.)
		RE37a	+	Carbon reductions via use of renewables - building operations (REEB/baseline req.)
		RE38	+	Percentage of buildings meeting target (less energy & more energy efficient)
		RE39	✓	Carbon savings from energy efficiency measures - on site
		RE39a	+	Carbon savings from use of renewables - on site
		RE40	✓	Embodied Carbon reductions against baseline
		RE62	✓	Carbon offset fund payments against new developments
	Air pollution is reduced	RE46	+	No. car miles saved on contract (e.g. resulting from green transport programme)
		RE47	+	No. car miles driven using low or no emission staff vehicles
		RE63	✓	Percentage of fleet or construction vehicles on contract that are at Least Euro 6 or LEV
		RE64	✓	Fleet emissions monitoring programme on the contract, including data collection
	Safeguarding the natural environment	RE65	✓	Offsets/mitigation initiatives on biodiversity where restoration isn't available
		RE48a	✓	Volunteering for environmental conservation & sustainable ecosystem management
		RE74	+	Percentage of plastic recycling on contract
	Resource efficiency and circular economy solutions are promoted	RE66	✓	Waste management verification policies (e.g. audit hierarchy)
		RE42	+	WATER: Percentage of buildings meeting good practice benchmark (e.g. REEB)
		RE76	+	Water efficiency policy is applied on contract
	Resource efficiency and circular economy solutions are promoted	RE43	✓	M ³ water saved against relevant benchmark (e.g. REEB)
		RE44	+	WASTE: Percentage of buildings meeting good practice benchmark (e.g. REEB)
		RE45	✓	Percentage of waste diverted against relevant benchmark (e.g. BREEAM)
		RE45a	+	Tonnes of waste diverted against relevant benchmark (e.g. BREEAM)
		RE75	+	Percentage of biocomposites and equivalent materials
	Sustainable Procurement is promoted	RE49	✓	Percentage of procurement contracts that include sustainable procurement commitments
	More buildings are certified	RE50	+	Percentage of NEW buildings achieving BREEAM Rating
		RE51	+	Percentage of assets that have undergone a climate risk assessment
		RE52	+	Percentage of assets where sustainability risk has been reduced
		RE53	+	Percentage of buildings achieving BREEAM IN-USE

Theme	Outcome	Real Estate		Measure (Short Title) <small>*Please refer to the full Measure phrasing on each measure page.</small>
		Ref.	Core / Add	
 <p>Innovation Promoting Social Innovation</p>	Social innovation to create local skills and employment	RE67	✓	<i>Innovative measures to promote local skills and employment</i>
	Social innovation to create local skills and employment	RE68	✓	<i>Innovative measures to promote and support responsible business</i>
	Social innovation to enable healthier safer and more resilient communities	RE69	✓	<i>Innovative measures to enable healthier, safer and more resilient communities</i>
	Social innovation to safeguard the environment and respond to the climate emergency	RE70	✓	<i>Innovative measures to safeguard the environment</i>



**Social Value
Portal**



Jobs

Promote local skills and employment



RE1



Theme: Jobs – Promote Local Skills and Employment

Outcome: More local people in employment

Measure: No. of local direct employees (FTE) hired or retained (for re-tendered contracts) on contract for one year or the whole duration of the contract, whichever is shorter.

Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1a, NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people directly employed on the contract, e.g. as a result of this procurement requirements (if you are the procuring organisation) or other set targets. If you are the bidding organisation or are reporting for measurement, only direct employees should be included here, while employment through supply chain can be captured through NT1c where this is included. Employees should be residing in the local area and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the definition of local area provided for the contract. Measure NT1b might signpost specific sub-localities specified in LIST NT1b. If you are recording direct employees under NT1b please ensure no double counting occurs. Please check evidence requirements for details on postcode collection.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for directly employing your target number of local people on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the number of qualifying employees directly employed on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome

Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1, NT1a, NT1c, as well as with NT18, NT18a, NT19, NT19a

Reporting

Local Economic Value

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people directly employed on the contract or employed through the supply chain. If you are a bidder you can include also jobs created through your own supply chain here. Recorded employees should be residing in the selected sub-localities (LIST NT1b) and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the list of specific sub-localities provided for this measure and for the specific contract (LIST NT1b). Please check evidence requirements for details on postcode collection. Include both direct employment and unlocked through the supply chain as a result of your procurement requirements. Should not be double counted with NT18/NT18a/NT19/NT19a. If you are recording direct employees under NT1 please ensure no double counting occurs.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, we ask you to calculate the full time equivalent (FTE) number of employees for the year. Please note that only employees with a contract duration that is at least one year or lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: Summarise your strategy for employing your target number of people from listed sub-localities on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome

Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1, NT1a, NT1b, as well as with NT18, NT18a, NT19, NT19a

Reporting

Local Economic Value

This measure should be reported as unlocked through the supply chain only

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people employed on the contract by the supply chain as a result of your procurement requirements. Employees included should be residing in the local area and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the definition of 'local area' provided for the specific contract. Please check evidence requirements for details on postcode collection. Should not be double counted with NT18/NT18a/NT19/NT19a.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your existing or planned requirements for the supply chain on local employment and their strategy for employing your target number of local people on this contract. For example, if they will advertise in local newspapers, please explain which ones and how regularly. Or, if they will cooperate with local job centres, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Local Economic Value

Technical Guidance

Definition: This is the percentage of people directly employed or employed through the supply chain as a result of your procurement requirements on the contract that reside within the local area, over the overall number of people employed on the contract. Please refer to the definition of local area provided above for NT1.

Unit Guidance: Number of local residents employed (directly and through the supply chain as a result of your procurement requirements) over the total number of employees on the contract – (%).

Target Guidance: Specify the total number of people that will be employed on this contract. Of these, what is the total number of local people that will be employed on this contract? If you have not done so for NT1, NT1b or NT1c summarise your strategy for employing your target number of local people on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the total number of people employed on this contract and the total number of local people employed on this contract. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded not monetised. This indicator reflects how the pledged intervention differs e.g. from the business as usual scenario. We are working at producing benchmarks for specific categories of projects that will help understand "what good looks like".

IOOI Rating: Outcome

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Local Economic Value

Technical Guidance

Definition: An employer's fair is designed to showcase potential new jobs to local people. The fair should be organised in conjunction with an employment partner, such as the local authority. Such events are appropriate during both the construction and in-use phases and should include as many parts of the supply chain as appropriate for the stage. The event should be held in a place that local people can access, there should be suitable notification of the event to the local community via relevant communication channels such as social media and the local press, and it should last around 4 hours. Insert costs of putting on the events including hiring of spaces, stands and staff time. Please include the number of events and details of each in the Description. Useful links: <https://www.jobmonkey.com/jobfairs/career-events/>; <https://www.founders4schools.org.uk/educators/careers-fair/>

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at £16.09 per staff hour).

Target Guidance: Provide a breakdown of expected costs for each employer's fair that will be held. Provide details of your upcoming employer's fairs, e.g. place, time and expected number of attendees.

Evidence Requirements: Provide a breakdown of the costs incurred for each employer's fair held to encourage local employment. Provide details of each employer's fair, e.g. place, time and number of attendees.

Technical Proxy Rationale: Input proxy – this proxy captures the cost of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) pledged to Employers Fairs, held to encourage local employment in the area.

IOOI Rating: Input

Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3a, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people directly employed as a result of a specific and deliberate employment initiative. Record the number of full time annual equivalent (FTE) employees taken on as a result of the contract that had been claiming Jobseeker’s Allowance (JSA) or Universal Credit unemployment benefits for at least the 12 months preceding the start of the employment contract. For a definition of long term unemployment see: <https://www.gov.uk/government/publications/predicting-likelihood-of-long-term-unemployment-the-development-of-a-uk-jobseekers-classification-instrument-wp116>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3a, NT3b, NT3c, NT3d, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of long-term unemployed people on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

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Measurement

Unit: No. people FTE

Valuation

Proxy: £14,782.00

Value for the Individual: £10,128.87 (68.52%)

Value for the Government: £4,652.69 (31.48%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of 16-24 yr. old employees taken on as a result of the contract that had not been in employment, education, or training (NEET) before the start of the employment contract. See the following link for a list of categories included: <https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/bulletins/youngpeoplenotineducationemploymentortrainingneet/november2019>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of people who are NEET on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) whether this is the first employment experience after having been NEET. For example, Employee 1: 3 months; full-time; 0.25 FTE; this is the first employment experience after being NEET. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Based on Unit Cost Database (UCDB) v2.0, E&E 9.0 and E&E9.1, updated to 2020/2021 prices. Based on people aged 18-24 and 16-17 who are Not in Education, Employment or Training (NEET) (Dec. 2019). Current costs and forgone benefits to the individual and the government associated with being NEET. Value to the individual comprises the loss of earnings to the young person whilst NEET (£10,534 for 18-24 y.o. and £5,177 for 16-17 y.o.). Fiscal value to the government comprises benefit payments (worklessness and housing benefits) and foregone tax and national insurance receipts (£4,984 for 18-24 y.o. and £606 for 16-17 y.o.). Deadweight combines the 41,3% of 18-24 y.o. NEETs being unemployed and the 39,7% of 16-17 y.o. NEETs being unemployed (Sept. 2020) with the off-JSA-benefit and off-UC/off-UC if it had been available in the area rates of 14,5% for 18-24 y.o. NEETs and 23% for 16-17 y.o. NEETs (Dec. 2019 - Nov. 2020). The employment data is sourced from Stat-Xplore (<https://stat-xplore.dwp.gov.uk/>). Deadweight should not be applied when the job opportunity would not have been created under the business as usual scenario. The proxy value is appropriate for the first year of employment. A red flag has been allocated in the UCDB v2.0 "in recognition of the global, top-down nature of the calculation, the age of the data, and the lack of consideration of wider fiscal elements such as costs associated with the health and/or crime impacts of being NEET." Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Outcome / Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £24,527.00

Value for the Individual: £18,007.18 (73.42%)

Value for the Government: £3,734.71 (15.23%)

Value for the Community: £2,785.26 (11.36%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees aged 18+ taken on as a result of the contract that were within the rehabilitation period before the start of the employment contract. Support from Youth Offending Teams (<https://www.gov.uk/youth-offending-team>), Jobcentre Plus or other agencies carrying out specific programmes may be beneficial in identifying eligible individuals. For guidance about rehabilitation periods see: <https://www.gov.uk/exoffenders-and-employment>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of 18+ year old rehabilitating or ex-offenders on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that they were an 18+ year old rehabilitating or ex-offender before the start of the employment contract; that this is the first employment experience as an ex-offender. For example, Employee 1: 3 months; full-time; 0.25 FTE; was a 29 year old rehabilitating or ex-offender before the start of the employment contract; this is the first employment experience. Provide details of any organisation partnered with Information provided should be made compliant with data protection requirements (GDPR).

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Measurement

Unit: No. people FTE

Valuation

Proxy: £24,527.00

Value for the Individual: £18,007.18 (73.42%)

Value for the Government: £3,734.71 (15.23%)

Value for the Community: £2,785.26 (11.36%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: The proxy value comprises the value to the individual from entering the labour market (annualised increase in lifetime earnings), the fiscal value to the NHS resulting from an average reduction in health care costs associated with being out of work, as well as the economic, fiscal and wellbeing value to society from preventing reoffending. The figures included in the proxy are the UK values for the population aged 18+. All components are based on Unit Cost Database (UCDB) v2.0 figures, updated to 2020/2021 prices, and MOJ prevention of reoffending statistics. See UCDB v2.0 for a more detailed description of unemployment and crime costs. An across-crimes crime multiplier of 4.3 has been applied to reflect the ratio of estimated total number of crimes (based on the Crime Survey for England and Wales, formerly British Crime Survey) to the number of comparable crimes recorded by the police (a UK weighted average of crime type multipliers - weighted according to the 2015/2020 distribution of reported crimes by typology - derived by GMCA Research Team and presented in the UCDB v2.0). A 3.96 multiplier has been applied to the average number of offences per offender, to take into account unproven offences (based on MOJ Crime statistics). The figures included in the proxy are the UK level values for the population aged 18+. They can be localised by choosing average reoffending figures for the relevant geographical area. Deadweight is established separately to reflect the reduction in reoffending probabilities for employed rehabilitating offenders (dw: 91%), and the average probability for rehabilitating offenders to be employed respectively (dw: 17%). Deadweight figures should be adjusted to reflect primary data from the project when available, e.g. by using success rates in preventing reoffending from a rehabilitating offender programme run in partnership with (or by) a VCSE. The proxy

value is appropriate for the first year of employment. For succeeding years of continued employment, it should be adjusted to reflect an increased probability of finding a job. Value to the individual or business who suffered the crime is £18,007, the value to the government is £3,735 and the value to society is £2,785. These have been calculated based on the UCDB v2.0 Economic, Fiscal and Social components and Comments. Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,787.47 (10.89%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that are disabled. A disabled person is defined as "someone with a physical or mental impairment that has a 'substantial' and 'long-term' effect on their ability to do normal daily activities" (Equality Act 2010). For guidance about employing disabled people and support programmes for employers please see: <https://www.gov.uk/government/publications/employing-disabled-people-and-people-with-health-conditions/employing-disabled-people-and-people-with-health-conditions>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of disabled people on this contract. For example, it is likely you will need to cooperate with job centres, care homes or charities so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE). For example, Employee 1: 3 months; full-time; 0.25 FTE. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

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Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,787.47 (10.89%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: Based on Unit Cost Database v2.0, E&E 2.0, updated to 2020/2021 prices. This proxy is based on "illustrative estimate by the Department of Work and Pensions (DWP) of the costs and benefits that would occur if some hypothetical 'typical' ESA WRAG (Work-Related Activity Group) claimant (who would otherwise have remained on benefits) were to move into employment for one additional year" (see UCDB v2.0 for a more detailed description). Value to the individual comprises increased earnings as a result of entering employment. Value to the government includes savings to the NHS related to a reduction in health care costs associated with being out of work. Fiscal benefits to the DWP have been excluded. Deadweight is based on the statistic that 50% of disabled unemployed are very likely to be long term unemployed. Therefore the deadweight figure is a weighted average of the probability of finding a job for a long-term unemployed person (4.62%) and the generic probability of finding a job for the generic JSA claimant (the deadweight value has been adjusted for the recent COVID impacts on the UK labour market, based on Nov. 2019 - Oct. 2020 data and inferences from the impact of the 2008/09 financial crisis). The proxy value is appropriate for the first year of employment. For succeeding years of continued employment it should be adjusted to reflect the increased probability of finding a job. Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Impact

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT8, NT11

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to individual or group employment support. Units targeted or claimed within this Measures should not be double counted with other similar Measures, including NT11.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people. The cumulative number across sessions should be reported.

Target Guidance: Summarise your strategy for supporting unemployed people into work (including the number of staff hours to be spent and the number of people to be supported). For each session, the number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours. The cumulative number across sessions should be reported. Describe the activity/activities to be carried out and provide details of any partner organisations you will work with.

Evidence Requirements: Specify the number of sessions, and for each session specify the duration, the number of staff providing unemployment support and the number of unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a sectoral shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Combined % of women hired on contract as fulltime annual equivalent (FTE) directly and through the supply chain. This Measure encourages increased hiring of women.

Unit Guidance: Number of women hired on the contract over the total number of people hired on the contract - (%). Please provide calculation both in original number of contracts and converted to FTE for comparison with other employment indicators. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: Summarise your expected combined % share of women hired on contract (FTE) directly and through the supply chain.

Evidence Requirements: Provide information on the % share of women working on contract (FTE). The provided data has to be supported by official company employment statistics or other documentation. If the data includes supply chain data suppliers have to provide the respective documentation. The data has to be adjusted for FTE employment to allow for comparability between different kinds of contracts.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Combined % of BAME (black, asian, minority ethnic) hired on contract as fulltime annual equivalent (FTE) directly and through the supply chain. This Measure encourages increased hiring of BAME.

Unit Guidance: Number of BAME hired on the contract over the total number of people hired on the contract - (%). Please provide calculation both in original number of contracts and converted to FTE for comparison with other employment indicators. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: Summarise your expected combined % share of BAME (black, asian, minority ethnic) hired on contract (FTE) directly and through the supply chain.

Evidence Requirements: Provide information on the % share of BAME (black, asian, minority ethnic) working on contract (FTE). The provided data has to be supported by official company employment statistics or other documentation. If the data includes supply chain data, suppliers have to provide the respective documentation. The data has to be adjusted for FTE employment to allow for comparability between different kinds of contracts.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Any specific initiatives or recruitment programmes in place for this contract that target women. This can include programmes in place with suppliers.

Unit Guidance: Upload initiatives' plan/report.

Target Guidance: Summarise planned programmes that will target women or a recruiting of women for this contract. This can include planned programmes in place with suppliers.

Evidence Requirements: Provide evidence on initiatives or recruitment programmes in place on the contract that target women. This can include general information on the programmes and would ideally include information on how they were implemented and the impact they had. If programmes in place with suppliers are included, the respective suppliers have to provide the necessary information.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Any specific initiatives or recruitment programmes in place for this contract that target BAME (black, asian, minority ethnic). This can include programmes in place with suppliers.

Unit Guidance: Upload initiatives' plan/report.

Target Guidance: Summarise planned programmes that will target BAME (black, asian, minority ethnic) or a recruiting of BAME for this contract. This can include planned programmes in place with suppliers.

Evidence Requirements: Provide evidence on initiatives or recruitment programmes in place on the contract that target BAME (black, asian, minority ethnic). This can include general information on said programmes and would ideally include information how they were implemented and the impact they had. If programmes in place with suppliers are included the respective suppliers have to provide the necessary information.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: No. staff hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT11

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to the preparation and delivery of curriculum related activities including literacy support, career talks, safety talks, etc. Please provide a description of the range of activities provided. Units targeted of claimed within this Measures should not be double counted with other similar Measures, including NT17 and NT29.

Unit Guidance: Example: if 10 staff have spent 3 hours each, then the total number of hours reported should be 30.

Target Guidance: Summarise your workplan for delivering your target number of local school and college visits. Provide a breakdown of the number of staff hours to be spent on each visit (preparation versus delivery). For example, if 10 staff will spend 3 hours each, then the total number of hours reported should be 30.

Evidence Requirements: Provide the names of the schools/colleges visited and a breakdown of the number of staff hours spent on each visit (including time spent preparing and then delivering the session). For example, if 10 staff have spent 3 hours each on a visit, then the total number of hours reported for that visit should be 30. Describe the visits and the activities delivered and provide any supporting information, e.g. a confirmation from the school/college after the visit. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering. It is based on the Office of National Statistics (ONS) hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input

Measurement

Unit: No. of visits

Valuation

Proxy: £64.36

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £64.36 (100%)

Reporting

Social Value

Technical Guidance

Definition: Site visits for local school children should be organised in tandem with local schools. They should last between approx. 30-60mins and include a short presentation about the project (e.g. a new building) and how it will benefit the area. The primary objective of the event is to encourage young people to consider a career in the projects primary industry or sector, such as construction or facilities management, including an overview of the variety of roles and possible career options for students, even if they are young students. The event should also be used to make school children aware of the dangers relating to the project, such as trespassing on the site out of hours. Useful links: <https://www.goconstruct.org/routes-into-construction/experience-construction/visit-a-construction-site/>.

Unit Guidance: Record no. of visits (assumed to be 30-60 minutes each).

Target Guidance: Summarise your strategy for delivering your target number of site visits for school children or local residents. Describe and provide details of the site visits including the duration and expected number of attendees per visit. Provide the names of the schools/colleges that will be involved.

Evidence Requirements: Describe and provide details of each site visit, including the duration and the number of school children or local residents attending each site visit. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy value for site visits for school children or local residents is based on the assumed duration of a site visit including preparation, valued at volunteering rate (£16.09 per hour).

IOOI Rating: Input

Measurement

Unit: No. weeks

Valuation

Proxy: £286.47

Value for the Individual: £286.47 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT11

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of training opportunities created specifically for the contract or that are made use of on contract can be counted, for those weeks during which a person works primarily on contract. Only vocational training opportunities supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT10 and other Measures around apprenticeships or vocational qualifications.

Unit Guidance: Record weeks of vocational qualification training provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as it will be supported to completion.

Target Guidance: Summarise your strategy for providing your target number of weeks of training for vocational qualifications on this contract, including details of how you will support completion of the qualifications. If possible, provide details of the accredited training provider, the type and the level of the outcomes to be achieved as well as the resulting qualification.

Evidence Requirements: Specify the number of people in vocational qualification training on this contract and the number of weeks of training per person. Provide details of the accredited training provider, the type and the level of the outcomes achieved as well as the resulting training qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

Technical Proxy Rationale: The proxy value has been computed combining the current economic benefit to the individual (based on minimum pay given the distribution of achievements by age and their average length), and the annualised future lifetime value to society of achieving the qualification (based on Unit Cost Database (UCDB) v2.0 updated to 2020/2021 prices, and the distribution of achievements by level). Value to the individual therefore includes current increased earnings and annualised value of future increased earnings as a result of achieving the qualification. It is the lower estimate, and reflects an assumption that 50% of the employment benefit is attributed to the qualification (see UCDB v2.0 for details). Estimates of distribution of achievements by age, average length, and level are based on data from the FE data library: further education and skills (<https://www.gov.uk/government/statistical-data-sets/fe-data-library-vocational-qualifications--2>), and BIS Returns to Intermediate and Low Level Vocational Qualifications, 2011. Per week attribution of lifetime benefits is based on the assumption that each week equally contributes to achieving the qualification. This assumption is likely to be revisited in future editions, to pick up on non-linearities.

IOOI Rating: Impact

Measurement

Unit: No. weeks

Valuation

Proxy: £224.07

Value for the Individual: £224.07 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT9a, NT10a, NT10b

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of apprenticeships created specifically for the contract or that are made use of on contract can be counted, for those weeks during which apprentices work primarily on contract. Only apprenticeships supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT9.

Unit Guidance: Record weeks of training for the apprenticeships provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as the apprenticeship will be supported to completion.

Target Guidance: Summarise your strategy for providing the target number of apprenticeship weeks on this contract, including details of how you will support completion of the apprenticeships. If possible, provide details of the accredited training provider, the type and the level of the apprenticeships to be achieved as well as the resulting qualifications. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Evidence Requirements: Specify the number of people on apprenticeships on this contract and the number of apprenticeship weeks per person. Provide details of the accredited training provider, the type and the level of the apprenticeship achieved, as well as the resulting qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Technical Proxy Rationale: The proxy value has been computed combining the current economic benefit to the individual (based on minimum pay given the distribution of achievements by age and their average length), and the annualised future lifetime value to society of achieving an apprenticeship (based on Unit Cost Database (UCDB) v2.0 updated to 2020/2021 prices, and the distribution of achievements by level and gender). If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider. Value to the individual therefore includes current increased earnings and annualised value of future increased earnings as a result of achieving the qualification. It is the lower estimate, and reflects an assumption that 50% of the employment benefit is attributed to the qualification (see UCDB v2.0 for details). Estimates of distribution of achievements by age, average length, and level are based on data from the FE data library: further education and skills (<https://www.gov.uk/government/statistical-data-sets/fe-data-library-further-education-and-skills> and <https://www.gov.uk/government/statistical-data-sets/fe-data-library-apprenticeships>). Per week attribution of lifetime benefits is based on the assumption that each week equally contributes to achieving the qualification. This assumption is likely to be revisited in future editions, to pick up on non-linearities.

IOOI Rating: Impact

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT8

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to individual or group employment support specifically for people under 24 years old. This Measure requires support to be targeted and focussed on the participating individuals. Group sessions should therefore be of a size that allows for individuals to be supported based on their specific needs. Units targeted or claimed within this Measure should not be double counted with other similar Measures including NT7.

Unit Guidance: The number of units reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of the number of people delivering the session.

Target Guidance: Summarise your strategy for supporting unemployed people into work (including the number of staff hours to be spent and the number of people to be supported). Describe the activity/activities to be carried out and provide details of any partner organisations you will work with.

Evidence Requirements: Specify number of sessions, and for each session the duration, number of staff providing unemployment support and unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Aimed at anyone (school or college pupils, local residents) interested in entering into the primary project industry or sector. They should include taster days across all professions relating to this primary sector, such as including construction, design and building management in the case of real estate. May be organised by any member of the professional team. The day needs to be properly managed with opportunities for young people to get a view of all aspects of the industry. Insert costs of putting on the events including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour). Please include the number of events and details of each in the Description. Useful links: <http://opendoors.construction/>

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour).

Target Guidance: Provide a breakdown of expected costs for each employment taster day to be held. Describe and provide details of your upcoming employment taster days, e.g. place, time and expected number of attendees.

Evidence Requirements: Provide a breakdown of the costs incurred for each employment taster day. Describe and provide details of each employment taster day, e.g. place, time and number of attendees. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) pledged to Employment taster days for those interested in working in the primary project sector, such as the real estate and construction industry. Staff time should be measured at £16.09 per staff hour.

IOOI Rating: Input

Measurement

Unit: No. weeks

Valuation

Proxy: £168.72

Value for the Individual: £168.72 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. Only work placements for students with a duration of 1 to 6 weeks (typically unpaid) should be registered here. The cumulative number of weeks (from 1 to 6 for each student work placement) should be registered. This Measure does not apply to placements longer than 6 weeks as the TOMs discourage unpaid long-term employment.. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships>. Should not be double counted with other work placement Measures.

Unit Guidance: Number of total student placement weeks on the contract (only student placements between 1-6 weeks).

Target Guidance: Summarise your strategy for providing your target number of weeks of student work placements or pre-employment courses on this contract. Specify the type of student work placements or/and pre-employment courses that will be provided, including what kind of industry-based experience they will result in and how. As you will cooperate with schools, colleges, or universities, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of people in student work placements or pre-employment courses on this contract, and for each person specify: the duration in weeks and type of the work placement or pre-employment course. Describe the industry-based experience gained and provide details of the school, college or university partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current equivalent economic benefit to the individual from equivalent increased earnings, based on minimum pay given the distribution of apprenticeships achievements by age.

IOOI Rating: Output

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £168.72

Value for the Individual: £168.72 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. The cumulative number of weeks of work placements (noting that each placement must last 6 weeks or more) should be registered. This Measure does not apply for placements shorter than 6 weeks as meaningful learning opportunities should be promoted.. Only placements paid at least minimum or national living wage, as per governmental regulations, should be included. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships> and here <https://www.gov.uk/national-minimum-wage-rates>. Should not be double counted with NT12 or similar work placement Measures.

Unit Guidance: Number of weeks in total on the contract (note that each placement must be at least 6 weeks).

Target Guidance: Summarise your strategy for providing your target number of positions and weeks of paid work placements on this contract. Specify the type of work placements (as well as pay type, i.e. minimum wage, national living wage or higher wage) that will be provided, including what kind of industry-based experience they will result in and how. If you will partner with any organisations, schools, colleges or universities, please specify which you will partner up with and how you will approach these.

Evidence Requirements: Specify the number of people in work placements, and for each person specify the following: the duration in weeks and type (including pay type, i.e. minimum wage, national living wage, higher wage) of the work placement. Describe the industry-based experience gained and provide details of any organisations, schools, colleges or universities that you have partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current economic benefit to the individual from actual minimum increased earnings, based on minimum pay given the distribution of apprenticeship achievements by age.

IOOI Rating: Output



Social Value
Portal



Growth

Supporting growth of responsible
regional business



Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (e.g. financial advice / legal advice / HR advice / HSE) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs). Please include only the amount of volunteering that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. Please note that MSMEs are defined as (0-250 employees) - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, and NT29. Please check also other relevant expert time Measures included.

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice to VCSEs/MSMEs. Provide the names of the VCSEs/MSMEs you will support or a range of options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advice/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (specifically around decarbonisation) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs) to achieve net zero carbon. In line with international ambitions, it is advised to aim for a reduction of emissions to net zero as soon as possible, with 2050 being the minimum target reflecting current UK government policy and an earlier target to be strongly encouraged. Many private sector organisations, sectoral institutions such as the World Green Building Council and more than 100 LAs have set the more ambitious 2030 target. Please include only the number of hours of expert staff time that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. MSMEs are defined as 0-250 employees - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, and NT29. Please check also other relevant expert time Measures included..

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice around decarbonisation to VCSEs/MSMEs to achieve net zero carbon. Provide the names of the VCSEs/MSMEs you will support or details of proposed options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert decarbonisation advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent supporting each VCSE/MSME, the type of expert advice provided, as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advise/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Relevant activities include donating a van to a community organisation or the use of office accommodation, etc. Equivalent £ value should be calculated and assumptions and details about the calculation should be made explicit. Attribution might need to be taken into account where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the toolkit guidance document for worked examples on attribution. Should not be double counted with N17 and NT28 and other Measures around donation of equipment or resources.

Unit Guidance: Equivalent £ value of the donation.

Target Guidance: Provide a list of VCSEs you have already identified or a range of options. Provide a breakdown of the value of resources and/or equipment to be donated to VCSEs, including the names of the VCSEs.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the VCSEs. This proxy is based on primary data, a pre-determined value cannot be established. A resource-specific valuation exercise of the assets should be carried out and accurately described.

IOOI Rating: Output



Measurement

Unit: No. staff expert hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: Volunteering is defined by the International Labour Organisation (2001) as ‘unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household’. Here, only staff volunteering hours should be recorded when time has been allocated for staff to spend on formal volunteering (not for family and friends). Please include only the amount of volunteering that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked examples on attribution. The following Measures should not be double counted : NT15, NT16, NT24, NT25, NT26, NT27, NT28, and NT29 and other volunteering Measures.

Unit Guidance: Number of staff hours spent on volunteering with VCSEs. For example, if 10 staff volunteer 3 hours each, then the reported total should be 30.

Target Guidance: Specify the list of VCSEs that are going to be supported and describe the volunteering activities to be delivered and their intended purposes. Provide a breakdown of staff volunteering hours to be delivered to VCSEs. For example, if 10 staff volunteer 3 hours each, then the reported total should be 30.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering. It is based on the Office of National Statistics (ONS) hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Local Economic Value

Technical Guidance

Definition: Opportunity for local suppliers, especially MSMEs and VCSE, to understand the potential of providing their services, goods or works to the development throughout its lifecycle from construction through to management and occupation. Providers need to ensure that the event is properly advertised and that specific opportunities have been identified. Where possible, providers should also invite potential suppliers whom they think may be able to benefit. Advice about how to tender successfully should be made available. Insert cost of putting on the events including hiring of spaces, stands and staff time (staff time can be captured at 16.09 £ per staff hour). Please include the number of events and details of each in the Description. Useful links: <https://www.cips.org/en-GB/supply-management/opinion/2014/november/how-to-revitalise-your-meet-the-buyer-events/>

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour)

Target Guidance: Provide a breakdown of expected costs for Meet the Buyer events to be held for this contract. Provide details of your upcoming Meet the Buyer event(s), e.g. place, time and expected number of attendees. Also provide names of attending supply chain organisations. Information provided should be made compliant with data protection requirements (GDPR).

Evidence Requirements: Provide a breakdown of costs incurred for Meet the Buyer events held for this contract. Provide details of each Meet the Buyer event, e.g. place, time and number of attendees. Also provide names of attending supply chain organisations. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy captures the cost of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) pledged to Meet the Buyer events held to highlight local supply chain opportunities.

IOOI Rating: Input / Output



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18a, NT19, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18a, NT19 and NT19a.

Unit Guidance: Total amount of £ spent with the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific basis to identify the % increase in local spend with respect to the business-as-usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business-as-usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT19, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the specified sub-localities identified for the contract in list NT18a. This should be calculated as the cumulative spend with suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18, NT19 and NT19a and other relevant spend Measures.

Unit Guidance: Total amount of £ spent with the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with organisations in your supply chain within the specified sub-localities on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each, as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with organisations in your local supply chain within the specified sub-localities (LIST NT18a) on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services procured from each, and the first half of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect a higher need due to e.g. high deprivation and this should be captured through prioritisation at procurement and through a separate indicator at measurement. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome

Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT18a, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with MSME suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the contract's supply chain. Should not be double counted with NT14, NT18, NT18a and NT19a. Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees).

Unit Guidance: Total amount of £ spent with MSMEs (0-249 employees) in the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of £ to be spent with organisations in your supply chain within the specified local area for this contract. Specify the name of each eligible supplier, including the category (MSME)/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of £ spent with organisations in your local supply chain. Specify the name of each eligible supplier, specifying that it is a Micro, Small or Medium Enterprise, and include the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect the specificity of spending with MSMEs. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: No. opportunities

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Please note that MSMEs are defined as (0-250 employees) - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees).

Target Guidance: Specify the number of relevant opportunities on the contract that you are planning to create, their relevance to de-carbonisation and how you are planning to target MSMEs specifically.

Evidence Requirements: List opportunities, relevance to de-carbonisation and winning MSME.

IOOI Rating: Outcome



Measurement

Unit: No. employees provided access

Valuation

Proxy: £131.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £131.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: Total number of direct or supply chain employees on contract provided with access to comprehensive and multidimensional workplace wellbeing programmes. Qualifying programmes should include the following dimensions, be well managed and employee benefits focussed, and be easily accessible and engaging to employees: flexible working time arrangements; healthy nutrition options; physical health programmes; a health risk appraisal questionnaire; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues). If offered digitally, e.g. to cater to those employees working from home, programmes should reflect potentially changed needs and staff expectations around workplace wellbeing derived through continued and meaningful consultation and engagement with employees. This is to ensure offered services remain relevant and are comprehensively provided. For a discussion of good practice approaches to improve staff wellbeing, please see the "Best Practice in Promoting Employee Health and Wellbeing in the City of London" research report: <https://www.birmingham.ac.uk/Documents/research/ias/employee-health-and-wellbeing-in-the-city-of-london-final.pdf>

Unit Guidance: Number of employees on contract that have access to qualifying staff wellbeing programmes.

Target Guidance: Summarise your strategy for providing access to a comprehensive workplace wellbeing programme to all employees, including measures in place or planned. Describe how the programme you are going to deliver is going to be structured around the following dimensions: flexible working time arrangements; healthy nutrition options; physical health; health risk appraisal questionnaires; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues). If you are partnering with any specialist organisation, please provide details or a range of options.

Evidence Requirements: Please upload a description of the wellbeing programme you have delivered and the number of people on the contract that had access to that. Provide evidence for all of the following for the contract context: employment contract based flexible working time arrangements; access to healthy nutrition options and physical health programmes; if available provide information on use rate of healthy nutrition options and physical health programmes. Information on physical health programmes can include the structure of health and wellbeing support and advice; evidence on and structure of health risk appraisal questionnaire; access to health and wellbeing resources (health improvement web portal; information on use of wellness literature; availability and times of seminars and workshops focused on identified wellness issues). If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Average increase in productivity per worker on contract from a workplace wellbeing programme, during the year of delivery. Calculated as a conservative percentage of the assessed increased productivity resulting from reduced absenteeism and presenteeism due to ill health within a sample programme. Measures in the assessed wellbeing programme include: flexible working time arrangements; healthy nutrition options; physical health programmes including personalised health and wellbeing information and advice; a health risk appraisal questionnaire; access to a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues. (Knapp, M., McDaid, D. and Parsonage, M., 2011. Mental health promotion and mental illness prevention: The economic case.; Mills, P.R., Kessler, R.C., Cooper, J. and Sullivan, S., 2007. Impact of a health promotion program on employee health risks and work productivity. American Journal of Health Promotion, 22(1), pp.45-53.) Please note the proxy has been modelled for a large enterprise, and it might underestimate the costs of delivering the programme for smaller businesses.

IOOI Rating: Outcome



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £101.86

Value for the Individual: £101.86 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: This includes training provided to own staff, Tier 1 supply chain and subcontractors specifically around equality, diversity and inclusion. Record the cumulative number of hours experienced by the attendees and specify both separately as a description. Only training provided for supply chain organisation at no cost to them should be included. Should not be double counted with NT20.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Describe your strategy for delivering equality, diversity and inclusion training to own staff and supply chain on this contract. Provide a workplan, including number of staff hours that will be spent and the number of people that will be involved in the training both from your own organisations and from those in the supply chain. Explain the objectives of the training session(s) and how progress towards these objectives will be monitored over the course of the contract.

Evidence Requirements: Provide a breakdown of staff hours spent providing equality, diversity and inclusion training to own staff and supply chain organisations on this contract, including the number of people involved in the training. Describe the objectives of the training session(s) and how progress towards these objectives will be monitored over the course of the contract. Information provided should be made compliant with General Data Protection Regulations (GDPR). If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: The proxy reflects the average estimated cost of training if delivered by an external consultant. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: No. employees provided access

Valuation

Proxy: £427.57

Value for the Individual: (0%)

Value for the Government: £48.41 (11.32%)

Value for the Community: £379.16 (88.68%)

Reporting

Social Value

Technical Guidance

Definition: Total number of direct or supply chain employees on the construction contract having been screened through a mental health survey. The survey has to be geared towards assessing risks of depression and anxiety among the workforce. Those employees identified as suffering from or at risk of depression and/or anxiety and interested in treatment have to be provided with access to a minimum of 6 sessions of Cognitive Behavioural Therapy (CBT) to address their mental health problems.

Unit Guidance: Number of employees on contract that have been screened through mental health screening and that also have access to CBT treatment if their screening identifies anxiety or depression issues.

Target Guidance: Summarise your strategy for providing access to mental health screening questionnaires for all employees on the contract and providing access to a minimum of 6 CBT sessions for all those employees that have been identified within the questionnaire as having depression or anxiety issues. If you are partnering with any specialist organisation, please provide details or a range of options.

Evidence Requirements: Provide evidence for mental health screening and availability of CBT sessions for own and sub-contractor employees on contract. This can include example mental health questionnaire; evidence for CBT service provision. If you are partnering with any specialist organisation, please provide details. requirements (GDPR).

Technical Proxy Rationale: Average annualized per person economic benefit from providing access to mental health screening and Cognitive Behavioural Therapy (CBT) for workers on contract - calculation based on per person fiscal savings to the NHS and local authority, and additional earnings for employees suffering from depression and or anxiety that are in treatment; benefit is averaged out for the entire workforce. Workplace-based enhanced depression care consists of completion by employees of a screening questionnaire, followed by care management for those found to be suffering from, or at risk of developing, depression and/or anxiety disorders. Those identified as being at risk of depression or anxiety disorders are offered a course of CBT delivered in six sessions over 12 weeks. This intervention has been shown in a number of studies to be effective in tackling depression and reducing productivity losses in various workplaces. The proxy value for RE59 being different than that for NT55 is a result of a higher suicide rate in the construction industry (Knapp, M., McDaid, D. and Parsonage, M., 2011. Mental health promotion and mental illness prevention: The economic case.; Unit Cost Database, 2019, Health Tab, HE11 measure).

IOOI Rating: Outcome



Measurement

Unit: Record only

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: Percentage of contracts within the supply chain that include commitments to ethical employment practices in the local and global supply chain, including requirements to ensure the supply chains are free from slavery and that encourage effective and transparent reporting. Please refer to: <https://www.antislaverycommissioner.co.uk/media/1329/independent-anti-slavery-commissioners-strategic-plan-19-21-screen-readable.pdf>. Should not be double counted with NT23, NT35, and other relevant Measures.

Target Guidance: Specify the total number of procurement contracts on this contract and the total number of those that will include commitments to ethical employment practices. If possible and applicable, provide a copy of your ethical procurement policy and a copy of your modern slavery statement.

Evidence Requirements: Specify the total number of procurement contracts on this contract and the total number of those that include commitments to ethical employment practices. If applicable, provide a copy of your ethical procurement policy and a copy of your modern slavery statement.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: As per Measure's phrasing. (Such payment terms can alleviate pressures especially on MSMSs and VCSEs within the supply chain and help tackle modern slavery issues.).

Unit Guidance: (Number of invoices paid within 30 days / Number of invoices paid on the contract) * 100 to arrive at a percentage.

Target Guidance: Please specify your payment conditions on the contract and commitments on the percentage of invoices paid within 30 days.

Evidence Requirements: Please specify the total number of invoices paid on the contract and the number of invoices paid within 30 days. Please provide evidence of implemented payment terms.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: This includes quantitative requirements in terms of social value delivered, monitoring and measurement mechanism for delivery (e.g. the National Themes, Outcomes and Measures system or equivalent). Should not be double counted with NT22 and NT35.

Unit Guidance: N/A

Target Guidance: Specify the total number of procurement contracts on this contract and the number of contracts that will include commitments to deliver social value on this contract. Explain how you will monitor and measure social value delivered through the supply chain on this contract, including how you will engage with your supply chain to promote social value.

Evidence Requirements: Specify the total number of procurement contracts on this contract and the total number of contracts that include commitments to deliver social value on this contract. Explain how you have monitored and measured social value delivered through the supply chain on this contract, including how you have engaged with your supply chain to promote social value.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Social Value
Portal



National Social
Value Taskforce



Social

**Healthier, safer and more resilient
communities**



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT25, NT26, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at reducing crime (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe what type of crime/s you aim to reduce, including how and where you aim to do so. Details of any organisations you will partner with to reduce crime must be provided.

Evidence Requirements: Provide a breakdown of pounds invested in initiatives aimed at reducing crime (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe what type of crime you have aimed to reduce, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR). Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combine with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT26, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at tackling homelessness (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe how you aim to tackle homelessness, including how and where you aim to do so. Details of any organisations you will partner with to tackle homelessness must be provided.

Evidence Requirements: Provide a breakdown of pounds invested in initiatives aimed at tackling homelessness (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17), and of any organisations you have partnered with. Describe how you have worked to tackle homelessness, including how and where you have aimed to do so. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combined with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan to describe how the initiatives will be delivered. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be considered (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at improving health and/or wellbeing in the community (including the number of staff hours valued at £16.09 per hour, i.e. the general value for volunteering (NT17)). Describe the type of health and/or wellbeing issue(s) you will address, including how and where you aim to do so. Provide details of any organisations you intend to partner with to deliver the initiatives.

Evidence Requirements: Provide a breakdown of the amount (£) to be invested in initiatives aimed at improving health and/or wellbeing in the community (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the type of health and/or wellbeing issues you have addressed, including how and where you have done so. Provide details of your initiatives and any organisations you have partnered with. Where an additional multiplier has been added at Measurement because of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of £ value to be invested in initiatives aimed at supporting older, disabled and vulnerable people to build stronger community networks (including the number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the group(s) you will be supporting and the activities you will deliver, including how and where you will do so. Details of any organisations you will partner with must be provided.

Evidence Requirements: Provide a breakdown of £ value (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at supporting older, disabled and vulnerable people to build stronger community networks. Describe the groups you have supported and the activities you have delivered, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output



Measurement

Unit: £ value

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be a cash donation or the equivalent value of in-kind contributions - e.g. donating a van to a community organisation - that have been made for a specific community project. The focus of this Measure is a direct provision of support to specific community projects, rather than a more general support for organisations such as VCSE. Equivalent £ value should be calculated and assumptions and details about the calculation should be made explicit. Attribution might need to be taken into account where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the toolkit guidance document for worked examples on attribution. This Measure should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: £ donated (or equivalent value in £)

Target Guidance: Provide a breakdown of the pound equivalent value of donations and/or in-kind contributions that will be donated to local community projects. Describe the local community projects you will support. Provide details of any organisations you will partner with.

Evidence Requirements: Provide a breakdown of the pound equivalent value of donations and/or in-kind contributions donated to local community projects. Describe the local community projects you have supported. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with General Data Protection Regulations (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output

Measurement

Unit: No. staff volunteering hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. Volunteering is defined by the International Labour Organisation (2001) as ‘unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household’. Here staff volunteering hours should only be recorded when time has been allocated for staff to spend on formal volunteering (not for family and friends). In the case of local community projects there might not be a community organisation at the receiving end of the volunteering, but it might be an initiative set up by the company itself based on local intelligence. Time invested in organising such activities must be recorded in this category on top of the staff volunteering time itself. Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with by the employees (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: For example, if 10 staff will volunteer 3 hours each, then the total number of hours reported should be 30.

Target Guidance: Describe the volunteering activity/ activities to be delivered and the local community projects to be supported. Provide details of any organisations you will partner with. Provide a breakdown of staff volunteering hours to be delivered to local community projects. Only regular work hours and overtime hours can be counted as volunteering hours. For example, if 10 staff will volunteer 3 hours each, then the total number of hours reported should be 30.

Evidence Requirements: Describe the volunteering activity/activities you have delivered and the local community projects you have supported. Provide details of any organisations you have partnered with. Provide a breakdown of staff volunteering hours delivered to local community projects. Only regular work hours and paid overtime hours can be counted as volunteering hours. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering activity. It is the ONS hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. A Community Charter is a document designed by the community that identifies the needs and opportunities, and directs businesses that can help towards specific deliverables. This could be provided through funding of a local community coordinator or a third party to facilitate the process. Supporting a local community coordinator means agreeing to be a sponsor and sign up to the initiatives, e.g. by directing staff volunteers towards them. This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT29, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in helping the local community draw up their own Community Charter or Stakeholder Plan (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe your strategy/workplan for engaging with the local community. Provide details of any organisations you will partner with.

Evidence Requirements: Provide a breakdown of pounds invested to help the local community draw up their own Community Charter or Stakeholder Plan (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Provide a copy of the Community Charter or the Stakeholder Plan and details of any organisations you have partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output

Measurement

Unit: No.

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: The Net Promoter Score is an index ranging from 1 to 100 that measures the willingness of customers to recommend a company's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with a company's product or service and the customer's loyalty to the brand. Occupier survey using NPS (or similar) to be carried out within 18 months of occupation and then on an annual basis. Organisations should develop an action plan to improve scores where appropriate. Useful links: <https://www.medallia.com/net-promoter-score/>

Unit Guidance: Provide the score.

Target Guidance: Describe your strategy and workplan for surveying occupier satisfaction.

Evidence Requirements: Provide evidence of Occupier Satisfaction Surveys undertaken. Specify the number of survey responses you have received out of the total number of occupiers. Demonstrate actions taken or new plans put in place to improve performance and to engage with occupier feedback. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress towards higher occupier satisfaction over time.

IOOI Rating: Impact

Measurement

Unit: Yes/No

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Post occupancy evaluation is designed to assess how content an occupier is with the new development. The survey should cover all aspects of occupation. For more information please see: <https://www.architecture.com/knowledge-and-resources/resources-landing-page/post-occupancy-evaluation>.

Unit Guidance: Yes / No.

Target Guidance: Describe your strategy and workplan for carrying out your Post Occupancy Evaluation.

Evidence Requirements: Provide evidence of the Post Occupancy Evaluation that you have carried out, including a copy of the Post Occupancy Evaluation Report. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: –



Social Value
Portal



Environment

Decarbonising and safeguarding our world

Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37a, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Reduction commitments can be aligned or compared with relevant industry benchmarks (e.g. REEB, RIBA Climate challenge). Reductions, baselines and target levels should be recorded in equivalent tonnes of CO₂ emissions based on standard kWh conversion factors. Reductions should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged (e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. This covers energy used during in-use. Energy savings can be evidenced through metering data or statement from Energy Manager (i.e. degree day adjusted average). For more information see: <http://www.betterbuildingspartnership.co.uk/node/130>). Should not be double counted with other CO₂e reduction measures such as NT31, RE37a, RE39, RE39a.

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of relevant emissions estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of relevant emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for an evidencing of the savings recorded through the main unit.

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Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37a, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Target Guidance: Specify and evidence the baseline level of emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. All information provided through this Measure should relate specifically to in operations energy use.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”).

While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. Provide a breakdown of your CO₂ emissions reductions related to energy savings, including energy metering data or a statement from your Energy Manager (note that accidental energy reductions, for instance caused by people heating less in summer, should not be counted here). Give details of the specific intervention that was undertaken to reduce the energy consumption.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. “(...) the economic cost of mitigating a unit cost of carbon”, to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2018) and BEIS’s DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact



RE37a

Theme: Environment
– Decarbonising and
Safeguarding our World

Outcome: Carbon
emissions are
reduced

Measure: Carbon emission reductions through increased use of renewable energy - building operations - (e.g. REEB benchmark, RIBA Climate Challenge).

Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Reduction commitments can be aligned or compared with relevant industry benchmarks (e.g. REEB, RIBA Climate challenge). Reductions, baselines and target levels should be recorded in equivalent tonnes of CO₂ emissions.

Reduction should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged (e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. This covers the use of renewable energy during in-use. (<https://www.gov.uk/government/collections/government-conversion-factors-for-company-reporting>). Should not be double counted with other CO₂e reduction measures such as NT31, RE37, RE39, RE39a.

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of relevant emissions estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of relevant emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for an evidencing of the savings recorded through the main unit.

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Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Target Guidance: Specify and evidence the baseline level of emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. All information provided through this Measure should relate specifically to the in operations energy mix.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”).

While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. Provide a breakdown of your renewable energy use related savings in CO₂ emissions. Give details of the specific intervention that was undertaken to increase the use of renewable energy.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. “(...) the economic cost of mitigating a unit cost of carbon”, to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2018) and BEIS’s DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: The number of buildings meeting the energy savings target over the total number of buildings. The energy savings target should be set in relation to the relevant benchmark or baseline specified for RE37.

Unit Guidance: (The total number of buildings that met the energy savings target / the number of buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings and the number of buildings expected to meet the energy savings target. Provide details of the target and clarify how you will reach it.

Evidence Requirements: Specify the total number of buildings and the number of buildings that met the energy savings target. Provide details of the target and clarify how you reached it.

IOOI Rating: Outcome

Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Reductions, baselines and target levels should be recorded in equivalent tonnes of CO₂ emissions based on standard kWh conversion factors.

Reduction should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged (e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. Evidence could include metering data or a statement from the Energy Manager (i.e. degree day adjusted average). May include use of energy efficient equipment above required minimum standards, such as a use of LED lighting or of hybrid generators. For further information see: <http://www.betterbuildingspartnership.co.uk/node/130>. Should not be double counted with other CO₂e reduction measures such as NT31, RE37, RE37a, RE39a.

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of relevant emissions estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of relevant emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for an evidencing of the savings recorded through the main unit.

See Next Page 



Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Target Guidance: Specify and evidence the baseline level of emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. All information provided through this Measure should relate specifically to on site energy use.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”).

While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. Provide a breakdown of your CO₂ emissions reductions related to energy savings. Give details of the specific intervention that was undertaken to reduce the energy consumption.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. “(...) the economic cost of mitigating a unit cost of carbon”, to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS’s DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact



Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: CO₂e savings arising from measures that increase the share of renewables used during construction. Reductions, baselines and target levels should be recorded in equivalent tonnes of CO₂ emissions.

Reduction should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged (e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. For further information see: the Government conversion factors for company reporting of greenhouse gas emissions (<https://www.gov.uk/government/collections/government-conversion-factors-for-company-reporting>). Should not be double counted with other CO₂e reduction measures such as NT31, RE37, RE37a, RE39.

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of relevant emissions estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of relevant emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for an evidencing of the savings recorded through the main unit.

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Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Target Guidance: Specify and evidence the baseline level of emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. All information provided through this Measure should relate specifically to the on site energy mix.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”).

While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. Provide a breakdown of your renewable energy use related savings in CO₂ emissions. Give details of the specific intervention that was undertaken to increase the use of renewable energy.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. “(...) the economic cost of mitigating a unit cost of carbon”, to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS’s DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact

Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39, RE39a

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: CO₂e savings arising from embodied carbon reductions. Reduction should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged (e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. Embodied carbon comprises the carbon emitted during the manufacturing process and construction of the building. A carbon assessment should be carried out according to BS EN 15978:2011. For further information see: <https://www.rics.org/globalassets/rics-website/media/upholding-professional-standards/sector-standards/building-surveying/whole-life-carbon-assessment-for-the-built-environment-1st-edition-rics.pdf>.

Additional information on embodied carbon can be accessed through the ICE (Inventory of Carbon and Energy) (https://circularecology.com/embodied-carbon-footprint-database.html#.XKX_oJhKhPY) or the Government conversion factors for company reporting of greenhouse gas emissions (<https://www.gov.uk/government/collections/government-conversion-factors-for-company-reporting>).

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for an evidencing of the savings recorded through the main unit.

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Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39, RE39a

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Target Guidance: Specify and evidence the baseline level of embodied carbon emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target embodied carbon emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”).

While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total embodied carbon emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. A carbon assessment must have been carried out according to BS EN 15978: 2011. Provide a copy of this assessment.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. “(...) the economic cost of mitigating a unit cost of carbon”, to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2018) and BEIS’s DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Monetary contributions to offset equivalent carbon emissions. £ value should be linked to the tonnes of CO₂e being offset and the value of carbon chosen for the calculation.

Unit Guidance: Contributions should be calculated based on the tonnes CO₂e and multiplied by the per tonne value of carbon agreed with the external fund.

Target Guidance: List contributions to offset carbon made into external fund (it could be from S106 agreements), providing a breakdown for the different types of offsetting and where relevant explanation of why said carbon cannot be reduced within the contract's timeframe and how reduction targets relate to relevant medium- to long-term net zero emissions targets. Please provide information on the conversion rate used (price of CO₂e applied per tonne).

Evidence Requirements: List contributions to offset carbon made on the contract into an external carbon offset fund, providing a breakdown for the different types of planned offsetting and where relevant explanation of why this carbon cannot be reduced within the contract's timeframe and how reduction targets relate to relevant medium- to long-term net zero emissions targets.

Technical Proxy Rationale: Monetary contributions to offset carbon emissions. £ value should be linked to the tonnes of CO₂e being offset and the value of carbon chosen for the calculation.

IOOI Rating: Output

Measurement

Unit: Miles saved

Valuation

Proxy: £0.02

Value for the Individual: (0%)

Value for the Government: £0.01 (54.01%)

Value for the Community: £0.01 (45.99%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Technical Guidance

Definition: These benefits are expected to be delivered as a result of transport programmes. Provide detail on different programmes including how passenger car miles have been saved, and figures that have been used as benchmarks. There is an expectation for independently assured and audited reports to be provided. Miles can be saved on contract or through direct contract related commuting / travel. Reasonable assumptions have to be made and evidenced regarding the reduction of car miles travelled. This measure can be localized if desired, which can lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Unit Guidance: Car miles (not hundreds of miles) saved against baseline, which must be provided.

Target Guidance: Provide details on the programme to be implemented to reduce passenger car miles driven, including a breakdown of the number of car miles to be saved and how the car miles will be saved. Specify the baseline to be used (i.e. car miles driven before a programme is put in place to reduce car miles driven) and full methodology of calculation. This measure can be localized if desired, which can lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Evidence Requirements: Provide details of the corporate green transport programme implemented to reduce passenger car miles driven, including a breakdown of the number of car miles saved and how they have been saved. Specify the baseline that is used (i.e. car miles driven before a programme was put in place to reduce car miles driven) and full methodology of calculation.

Technical Proxy Rationale: Carbon cost of CO₂ emissions and social cost (including health costs) of PM2.5 and NOx for emissions from road transport by cars (ref. fleet 2019). The Carbon cost is from DfT's WebTAG guidance and based on estimated abatement costs that will need to be incurred in order to meet specific emissions reduction targets ((HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS's DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>). The social cost based on DEFRA Damage Cost Approach (DCA) and monetised. Updated to 2020 prices. The value has changed from 2020 due to updates to the pollution costs published by DEFRA, providing more accurate measurement of costs occurring as a result of NOx and PM2.5 emissions.

IOOI Rating: Outcome / Impact

Measurement

Unit: Miles driven

Valuation

Proxy: £0.01

Value for the Individual: (0%)

Value for the Government: £0.01 (38.21%)

Value for the Community: £0.01 (61.79%)

Reporting

Social Value

Technical Guidance

Definition: These benefits are expected to be delivered as a result of transport programmes. Examples of evidence would be fleet reports or mileage logs. There is an expectation for independently assured and audited reports to be provided.

Unit Guidance: No. miles driven on contract on LEV as part of a specific sustainable transport programme

Target Guidance: Provide details on the programme to be implemented. When in addition to data on the miles driven additional data on the location is collected, this measure can further be localized if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localisation of this Measure.

Evidence Requirements: Fleet report and mileage log. There is an expectation for independently assured and audited reports to be provided.

Technical Proxy Rationale: CO₂, PM2.5 and NO_x emissions saved by Low Emission Vehicles (LEV) (defined by emissions <75mg/km). Carbon cost of CO₂ emissions and social cost (including health costs) of PM2.5 and NO_x for emissions from road transport by cars (ref. fleet 2019). The Carbon cost is from DfT's WebTAG guidance and based on estimated abatement costs that will need to be incurred in order to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS's DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>). The social cost based on DEFRA Damage Cost Approach (DCA) and monetised. Updated to 2020 prices.

IOOI Rating: Outcome / Impact

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: % of the fleet used on contract that comply with EURO 6 emissions standards (including all sub-categories of EURO 6) or are LEV (Low Emission Vehicles such as electric or hybrid). This includes passenger cars, light commercial vehicles and heavy trucks.

Unit Guidance: (Number of EURO 6 and LEV vehicles used on contract) / Total number of vehicles used on contract) * 100 to arrive at a percentage.

Target Guidance: Provide information on the % of the fleet planned to be used directly on contract that comply with EURO 6 emissions standard or are LEV (Low Emission Vehicles such as electric or hybrid). The fleet includes passenger cars, light commercial vehicles and heavy trucks.

Evidence Requirements: Provide information on the % of the fleet used directly on contract (this excludes employee commuting) that complies with EURO 6 emissions standards or are LEV (Low Emission Vehicles such as electric and hybrid). The fleet includes passenger cars, light commercial vehicles and heavy trucks.

Technical Proxy Rationale: Record, not monetised. This indicator measures progress towards fleet modernization with the goal of reduced air pollutant emissions.

IOOI Rating: Outcome / Impact

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Fleet emissions monitoring programme on the contract including collection of data for each vehicle used on contract. Per vehicle used it is necessary to collect data on: distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localisation of this measure.

Unit Guidance: Upload description of your data collection programme, confirming that you will collect data on each vehicle used on the contract. Per vehicle used it is necessary to collect data on: distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d).

Target Guidance: Please describe your plan for collecting data on each vehicle expected to be used on contract, including expected distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2,

EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Evidence Requirements: Breakdown of travel data for each vehicle used directly on contract (including by contractors), including distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/guidance/air-quality-economic-analysis>. Please reach out to SVP if you have further questions regarding the localisation of this measure.

Technical Proxy Rationale: Recorded, not monetised. Data collection programme - can be monetised through a bespoke Measure, provided all data has been collected. Emissions savings are generated through the use of a modern low emissions vehicle fleet versus a baseline vehicle fleet.

IOOI Rating: –

Measurement

Unit: £ (Calculated Natural Capital Benefits)

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Biodiversity loss offset or mitigation initiatives' benefits calculated through an independent Natural Capital assessment. See https://capitalscoalition.org/capitals-approach/natural-capital-protocol/?fwp_filter_tabs=guide_supplement.

Unit Guidance: Total calculated Natural Capital benefits in £.

Target Guidance: Expected Natural Capital benefits to be monetised through independent analysis.

Evidence Requirements: Provide a full study containing the natural capital benefits analysis. The study must be provided and assured by an independent provider. Details on the study provider must also be provided.

Technical Proxy Rationale: The proxy allows independently calculated natural capital benefits to be recorded.

IOOI Rating: Outcome / Impact

Measurement

Unit: £ invested - including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Participation and resources to be invested, including time and volunteering, in relevant environmental conservation and sustainable ecosystem management initiatives that can be attributed to the contract.

Only volunteering hours spent during work hours or paid overtime hours can be counted.

Unit Guidance: Total £ value including time, funds and in-kind contributions. Volunteering time spent in multi-stakeholder engagement initiatives and sustainable ecosystem management can be valued at £16.09 per hour.

Target Guidance: Participation and resources invested including time and volunteering that can be attributed to the contract. Only volunteering hours spent during work hours or paid overtime hours can be counted.

Evidence Requirements: For each initiative or project supported, provide a breakdown of volunteering and staff time invested, alongside other investment. Only volunteering hours spent during work hours or paid overtime hours can be counted.

Technical Proxy Rationale: Input value - record investments. Volunteering time spent in multi-stakeholder engagement initiatives and sustainable ecosystem management can be valued at £16.09 per hour.

IOOI Rating: Input / Output

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: % of plastic used on the contract that is recycled.

Unit Guidance: (Plastics used on the contract that are recycled (tonnes) / total plastic used on the contract (tonnes)) * 100 to arrive at a percentage.

Target Guidance: % of plastic used on the contract that is expected to be recycled.

Evidence Requirements: Provide a breakdown of the total amount of plastic used on the contract and the total amount of that that has been recycled.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

 **Measurement**

Unit: Y/N - Provide description

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: Policies on waste management specifying auditing and verification on downstream management.

Unit Guidance: Provide policies and/or describe the auditing processes.

Target Guidance: Please provide copies of relevant policies, strategies and planned downstream waste management audits.

Evidence Requirements: Please upload policies and results from downstream audits implemented on the contract.

Technical Proxy Rationale: Record not monetised.

IOOI Rating: –

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Description: Percentage of buildings meeting good practice water benchmark (e.g. REEB).

Unit Guidance: (Total buildings meeting good practice benchmark / total buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings and the number of buildings expected to meet or exceed the target benchmark. Provide details of the target benchmark and how it is expected to be reached.

Evidence Requirements: Specify the total number of buildings and the number of buildings expected to meet or exceed the benchmark. Provide details of the target benchmark and how it is expected to be reached.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of buildings meeting good practice in terms of water saved against relevant benchmark (e.g. REEB) or baseline.

IOOI Rating: Outcome

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: A water efficiency policy provides information on water waste and water use related to contract operations, and aims to reduce both through changes in processes, upgrading of materials and infrastructure and information campaigns. The UK needs to reduce its general water use, and in particular its potable water use over the coming decades, relating to the impacts of Climate Change, and this measure provides a vehicle to engage with these needs. For further information on how to engage with this topic please see DEFRA Report "Action taken by Government to encourage the conservation of water" (https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/308019/pb14117-water-conservation-action-by-government.pdf).

Unit Guidance: Provide description of the policy in place.

Target Guidance: Specify if a water efficiency policy will be in place and outline its content and how it aims to reduce water waste and water use for contract related operations.

Evidence Requirements: Specify if a water efficiency policy is in place and outline its content and how it aims to reduce water waste and water use for contract related operations.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: M³

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: M³ water savings against good practice industry benchmark as set by REEB by building/asset type or RIBA Climate Challenge. The benchmark being used must be specified. For further information see: <http://www.betterbuildingspartnership.co.uk/node/130>.

Unit Guidance: M³ water saved against relevant benchmark (e.g. REEB), which must be provided.

Target Guidance: Specify the benchmark and baseline to be used. Provide a breakdown of your expected water savings and describe the measures to be implemented to achieve these. Provide both your expected total water savings and your expected water savings above the chosen benchmark.

Evidence Requirements: Provide evidence on the adopted benchmark and baseline. Provide a breakdown of your water savings and describe the measures you have implemented to achieve these. Provide both your total water savings and your water savings above the chosen benchmark. Include supporting evidence such as water statements.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the M³ water saved against a specified baseline and above a relevant benchmark (e.g. REEB).

IOOI Rating: Outcome

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Description: Percentage of buildings meeting good practice waste benchmark (e.g. REEB).

Unit Guidance: (Total buildings meeting good practice benchmark / total buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings owned or within a particular fund and the number of buildings owned or within a particular fund expected to meet the target. Provide details of the target and how it is expected to be reached.

Evidence Requirements: Specify the total number of buildings owned or within a particular fund and the number of buildings owned or within a particular fund expected to meet the target. Provide details of the target and how it has been reached.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of buildings meeting good practice in terms of waste reduced against relevant benchmark (e.g. REEB) or baseline.

IOOI Rating: Outcome

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: Percent of waste diverted from landfill above a good practice industry benchmark such as BREEAM: construction waste benchmark for different waste categories diverted from landfill. BREEAM report a minimum benchmark of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only percentages of waste diverted above this figure should be counted. For further information see: BREEAM New Construction Manual 2018 - Wst01 - Construction Waste Management: https://www.breeam.com/NC2018/content/resources/output/10_pdf/a4_pdf/print/nc_uk_a4_print_mono/nc_uk_a4_print_mono.pdf.

Unit Guidance: Percentage of waste diverted from landfill over a typical benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only tonnes diverted above this should be recorded.

Target Guidance: Specify the benchmark to be used. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate what percentage of your total waste will be diverted from landfill above the chosen benchmark. Provide both your expected total waste diverted and your expected waste diverted above the benchmark. Provide a breakdown of your expected waste diverted and describe the measures to be implemented to achieve this.

Evidence Requirements: Provide evidence on the adopted benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate what percentage of your total waste has been diverted from landfill. Provide both your total waste diverted and your waste diverted above the benchmark. Provide a breakdown of the waste diverted and describe the measures you have implemented to achieve this. Include supporting evidence such as waste certificates.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of waste diverted against landfill above a relevant good practice industry benchmark.

IOOI Rating: Outcome / Impact



Measurement

Unit: Tonnes

Valuation

Proxy: £96.70

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £96.70 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Tonnes waste diverted from landfill against a good practice industry benchmark such as BREEAM: construction waste benchmark for different waste categories diverted from landfill. BREEAM report a minimum benchmark of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only tonnes of waste above this figure should be reported. For further information see: BREEAM New Construction Manual 2018 - Wst01 - Construction Waste Management: https://www.breeam.com/NC2018/content/resources/output/10_pdf/a4_pdf/print/nc_uk_a4_print_mono/nc_uk_a4_print_mono.pdf.

Unit Guidance: No. of tonnes diverted from landfill over a typical benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only tonnes diverted above this should be recorded.

Target Guidance: Specify the benchmark to be used. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate the tonnes of waste expected to be diverted from landfill above the chosen benchmark (Standard Rate of Landfill Tax - e.g. wood, plastics and green waste). Provide both your expected total waste diverted and your expected waste diverted above the benchmark. Provide a breakdown of your expected waste diverted and describe the measures to be implemented to achieve this.

Evidence Requirements: Provide evidence on the adopted benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate the tonnes of waste diverted from landfill above the chosen benchmark (Standard Rate of Landfill Tax - e.g. wood, plastics and green waste). Provide both your total waste diverted and your waste diverted above the benchmark. Provide a breakdown of your waste diverted and describe the measures implemented to achieve this. Include supporting evidence such as waste certificates.

Technical Proxy Rationale: Standard Landfill rate.

IOOI Rating: Outcome / Impact

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: % of biocomposites and equivalent materials used as part of the project, such as for building materials. This can include supplier information.

Unit Guidance: % can be calculated as 'spend on biocomposites materials on contract' / 'total spend on materials on contract'.

Target Guidance: Summarize the planned % share of biocomposites and equivalent materials used as part of the project. This can include planned use by suppliers.

Evidence Requirements: Provide information and evidence of the % share of biocomposites and equivalent materials used as part of the project. This can include expenses, planning documents, supplier information.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: % of contracts

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: List requirements and contracts where applied.

Unit Guidance: (Total contracts including relevant commitments / total contracts) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of procurement contracts on the contract, and the total number of contracts that will include sustainable procurement commitments on the contract. Provide a copy of your sustainable procurement policy or an equivalent statement.

Evidence Requirements: Specify the total number of procurement contracts on the contract and the total number of contracts that have included sustainable procurement commitments on the contract. Provide a copy of your sustainable procurement policy or equivalent statement.

Technical Proxy Rationale: Recorded, not monetised. Indicator can be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: % to be displayed against each level (i.e. Good, Very Good, Excellent, Outstanding). Useful links: <https://www.breeam.com/NC2018>.

Unit Guidance: (Total NEW Buildings achieving BREEAM Rating / Total NEW Buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of new buildings and the total number of new buildings that will achieve BREEAM rating. Specify which BREEAM rating you are targeting.

Evidence Requirements: Specify the total number of new buildings and the total number of new buildings achieving BREEAM rating. Specify which BREEAM rating you have achieved and provide a copy of your BREEAM certificate.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of new buildings achieving BREEAM rating. It could be used for comparisons and for evaluating progress.

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: A climate risk assessment is used to assess the potential risk from changes in our climate on the development. It should cover construction and in-use phases and look at extreme weather events such as flooding, wind, extreme temperatures as well as the impact of average increasing temperatures over the lifetime of the building. For further information see: <http://www.unepfi.org/fileadmin/documents/IntegratingClimateRisksInRealEstate.pdf>; <https://www.hillbreak.com/wp-content/uploads/2017/03/real-estate-climate-risk-report-2017.pdf>.

Unit Guidance: (Total number of assets that have undergone a climate risk assessment / Total number of assets) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of assets and the number of assets that will undergo a climate risk assessment. A copy of your Climate Risk Assessment will need to be provided, along with an explanation of how it will be acted upon.

Evidence Requirements: Specify the total number of new buildings and the total number of new buildings achieving BREEAM rating. Specify which BREEAM rating you have achieved and provide a copy of your BREEAM certificate.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of assets that have undergone a climate risk assessment.

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: A sustainability risk is an uncertain social or environmental event or condition that, if it occurs, can cause a significant negative impact on the development. It includes the opportunities that may be available to an organisation because of changing social or environmental factors. For further information see: http://www.betterbuildingspartnership.co.uk/sites/default/files/media/attachment/BBP_Acquisitions%20Sustainability%20Toolkit.pdf.

Unit Guidance: (Total assets where sustainability risk has been reduced / Total assets) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of assets and the number of assets for which a sustainability risk will be reduced. Explain how the sustainability risk will be reduced in a working plan. A copy of your assessment and an explanation of how the sustainability risk has been reduced will be required when reporting on this Measure.

Evidence Requirements: Specify the total number of assets and the number of assets for which the sustainability risk has been reduced. Provide a copy of your assessment and an explanation of how the sustainability risk has been reduced.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of assets where the sustainability risk has been reduced.

IOOI Rating: Outcome

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: BREEAM In-Use is an online, international, environmental assessment methodology for independent, third party assessment and certification of a building's operational performance. The standard enables property investors, owners, managers, and occupiers to drive sustainable improvements through operational efficiency, including how to continually manage the operation of their building effectively.

Unit Guidance: (Total buildings achieving BREEAM IN-USE / Total buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings and the total number of buildings that will achieve BREEAM IN-USE rating. Specify which BREEAM IN-USE rating you are targeting.

Evidence Requirements: Specify the total number of buildings and the total number of buildings achieving BREEAM IN-USE rating. Specify which BREEAM IN-USE rating you have achieved and provide a copy of your BREEAM IN-USE certificate.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of new buildings achieving BREEAM IN USE rating. It could be used for comparisons and for evaluating progress.

IOOI Rating: Outcome



**Social Value
Portal**



Innovation

Promoting social innovation



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to promote local skills and employment to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment, or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations that you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT14.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to promote and support responsible business to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT15.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to enable healthier, safer and more resilient communities to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see NT16.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to safeguard the environment and respond to the climate emergency to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.


Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT17.



IOOI Rating: Input / Output






**Social Value
Portal**



Workplace and Facilities Management Plug-In Measurement Framework

Theme	Outcome	Facilities Management		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Jobs Promote Local Skills and Employment</p>	More local people in employment	FM1	✓	No. of local direct employees (FTE) hired or retained (for re-tendered contract) on contract
		FM1a	+	No. residents (FTE) employed from listed sub-localities (direct/supply chain)
		FM1b	+	No. of local people (FTE) on contract employed through the supply chain
		FM2	✓	Percentage of local employees (FTE) on contract
		FM3	✓	£ invested in employer's fairs held to encourage local employment in the area
	Fair Work	FM4	✓	Union recognition agreements & collective bargaining are present and encouraged
	More opportunities for disadvantaged people	FM5	✓	No. of employees (FTE) hired on contract who are long term unemployed (1+ yr)
		FM6	✓	No. of employees (FTE) hired on the contract who are NEETs
		FM6a	+	No. of 16-25 y.o. care leavers (FTE) hired on the contract
		FM7	+	No. of 18+ rehabilitating or ex-offenders (FTE) hired on the contract
		FM8	✓	No. of disabled employees (FTE) hired on the contract
		FM8a	+	No. of disabled armed forces veteran employees (FTE) hired on the contract
		FM13	✓	No. of hours supporting unemployed people into work (24 yo+)
		FM9	+	Percentage of women (FTE) hired on the contract
		FM10	+	Percentage of employees (FTE) BAME hired on the contract
		FM11	+	Specific initiatives/recruitment programmes for women run for the contract (Y/N)
	FM12	+	Specific initiatives/recruitment programmes for BAME run for the contract (Y/N)	
	Improved skills	FM14	+	No. of staff hours spent on local school and college visits (inc. prep. Time)
FM15		+	No. site visits for school children or local residents	
FM16		+	Company and supply chain policies for CPD in place	
FM17		✓	No. of weeks of training opportunities on the contract - Level 2, 3 or 4+	
FM18		✓	No. of weeks of apprenticeships on the contract - Level 2, 3 or 4+	

Theme	Outcome	Facilities Management		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Jobs Promote Local Skills and Employment</p>	Improved skills for disadvantaged people	FM17a	✓	Weeks of training opps on contract for disadvantaged groups - Level 2, 3, or 4+
		FM18a	✓	No. of weeks of apprenticeships for disadvantaged groups - Level 2, 3 or 4+
		FM19	+	Comprehensive training for digital skills development delivered
	Improved skills for a low carbon transition	FM20	+	Hrs supporting those in traditional high carbon industries to retrain (just transition)
		FM18b	✓	No. weeks of apprenticeships on contract, low carbon economy - Level 2, 3 or 4+
	Improved employability of young people	FM21	✓	No. of hours dedicated to support young people into work (16-24 yo)
		FM24	✓	£ invested in employment taster days (project related sector or industry)
		FM22	✓	Weeks of meaningful work placements / pre-employment courses (students, 1-6 wks, unpaid)
		FM23	+	No. of weeks of meaningful paid work placements (6+ weeks, paid)
		FM23a	+	No. of weeks of meaningful work placements that pay Real Living wage (6+ weeks)
 <p>Growth Supporting Growth of Responsible Regional Business</p>	More opportunities for local MSMEs and VCSEs	FM25	✓	Total amount (£) spent with VCSEs within your supply chain
		FM26	✓	No. hours of expert business advice to VCSEs and MSMEs
		FM26a	+	No. hours helping VCSEs and MSMEs achieve net zero carbon by 2050 or before
		FM27	+	Equipment or resources donated to VCSEs (£ equivalent value)
		FM28	✓	Number of voluntary hours to support VCSEs (excl. expert advice)
		FM32	+	Meet the buyer events held to highlight local supply chain opportunities
		FM29	✓	Total spent in the LOCAL supply chain through the contract
		FM29a	+	Total amount (£) spent through the contract in specified sub-localities
		FM30	✓	Total amount (£) spent through the contract with LOCAL MSMEs
		FM30a	+	Total spent with local micro and small enterprises through the supply chain
	FM31	+	No. opps. for local MSMEs to respond to tenders for de-carbonisation work	
	Improving staff wellbeing and mental health	FM33	✓	No. employees provided access to multidimensional wellbeing programmes
		FM34	✓	£ invested in mental health campaigns for staff
		FM36	✓	Equality, diversity and inclusion training for staff & supply chain
		FM37	+	Offering pro-bono responsible budgeting support to employees
FM35		+	No. of employees provided with support for anxiety/depression (Construction)	

Theme	Outcome	Facilities Management		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Growth Supporting Growth of Responsible Regional Business</p>	Reducing inequalities	FM38	+	% median gender salary gap for prime contractor staff - SMEs
		FM39	+	Number and type of initiatives put in place to reduce the gender pay gap
		FM40	✓	Percentage of staff paid at least the relevant Real Living wage (Living Wage Foundation)
		FM41	+	Percentage of contractors in the supply chain required to pay at least Real Living wage
		FM42	✓	No. employees (FTE) on a renewed contract or TUPE to have a pay raise to Real living wage or higher
	Ethical Procurement is promoted	FM43	✓	Percentage of procurement contracts including commitments to ethical procurement
		FM44	+	Initiatives in the supply chain to identify & manage risks of modern slavery
		FM45	+	No. supply chain audits to identify & manage risk of modern slavery occurring
		FM46	+	No. people employed to identify & manage risk of modern slavery occurring
		FM47	✓	Percentage of invoices on the contract paid within 30 days
Social Value embedded in the supply chain	FM48	✓	Percentage of supply chain contracts with social value commitments, measurement & monitoring	
 <p>Social Healthier, Safer and more Resilient Communities</p>	Crime is reduced	FM49	✓	Initiatives aimed at reducing crime
	Creating a healthier community	FM50	✓	Initiatives to be taken to tackle homelessness
		FM51	+	Initiatives to support rough sleepers, inc. training for security & night staff
		FM52	✓	Initiatives to engage the community in health or wellbeing initiatives
		FM53	+	Percent of catering contracts including requirements around nutritional content
	Vulnerable people are helped to live independently	FM54	✓	Initiatives to support older, disabled and vulnerable with community networks
	More working with the Community	FM55	+	Donations or in-kind contributions to local community projects (£ & materials)
		FM56	✓	No. of hours volunteering time provided to support local community projects
		FM57	+	Support local community draw up their own Community Charter/Stakeholder Plans
	Our Occupiers are more satisfied	FM58	+	Occupier satisfaction score (NPS)
FM59		+	Post Occupancy Evaluation has been carried out	

Theme	Outcome	Facilities Management		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Environment Decarbonising and Safeguarding our World</p>	Carbon emissions are reduced	FM60	✓	Savings in CO ₂ emissions on contract achieved through de-carbonisation
		FM61	+	Policy and programme to achieve net zero carbon by 2050 or before
		FM62	+	Contributions made on the contract to own carbon offset fund or external provider
		FM65	+	Carbon Certification
		FM66	✓	Carbon reductions via energy efficiency measures - building operations (REEB/baseline req.)
		FM67	+	Percentage of buildings meeting target (less energy & more energy efficient)
		FM63	+	Embodied Carbon reductions against baseline
		FM64	+	Carbon offset fund payments against new developments
	Air pollution is reduced	FM68	+	No. car miles saved on contract (e.g. resulting from green transport programme)
		FM69	+	No. car miles driven using low or no emission staff vehicles
		FM70	+	Corporate travel schemes available to employees on contract
		FM71	+	Percentage offleet or construction vehicles on contract that are at Least Euro 6 or LEV
		FM72	✓	Fleet emissions monitoring programme on the contract, including data collection
		FM73	✓	Internal air quality regulations & continuous monitoring policies are in place
	Safeguarding the natural environment	FM77	+	Donations towards environmental & biodiversity conservation initiatives
		FM78	+	Donations or investments towards sustainable reforestation/afforestation
		FM74	+	Offsets/mitigation initiatives on biodiversity where restoration isn't available
		FM75	+	Volunteering for environmental conservation & sustainable ecosystem management
		FM76	✓	Percentage of plastic recycling on contract
	Resource efficiency and circular economy solutions are promoted	FM88	+	Support internally and to supply chain to adopt Circular Economy solutions
		FM89	✓	Single-use plastic packaging eliminated through reusable packaging solutions
		FM90	✓	Value of local partnerships to implement circular economy solutions
		FM91	✓	Hard-to-recycle waste diverted from landfill/incineration
		FM79	✓	Waste management verification policies (e.g. audit hierarchy)
		FM80	+	WATER: Percentage of buildings meeting good practice benchmark (e.g. REEB)
		FM81	+	M3 water saved against relevant benchmark (e.g. REEB)
		FM82	+	WASTE: Percentage of buildings meeting good practice benchmark (e.g. REEB)
		FM83	✓	Percentage of waste diverted against relevant benchmark (e.g. BREEAM)
		FM83a	+	Tonnes of waste diverted against relevant benchmark (e.g. BREEAM)

Theme	Outcome	Facilities Management		Measure (Short Title) <i>*Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	Core / Add	
 <p>Environment Decarbonising and Safeguarding our World</p>	Resource efficiency and circular economy solutions are promoted	FM84	+	Percentage of biocomposites and equivalent materials
		FM85	+	Comprehensive action plan for tracking & reducing food waste on site
		FM86	+	Reduction of food waste through donation of leftover food to local charities
		FM87	+	Furniture procured on the contract which is refurbished instead of new
		FM92	+	Initiatives to redesign spaces to improve waste management and recycling practices
	Sustainable Procurement is promoted	FM93	✓	Percentage of procurement contracts that include sustainable procurement commitments
		FM94	+	Percentage of supply chain contracts requiring use of low/zero emission vehicles
		FM95	+	Supply Chain Carbon Certification
		FM96	+	No. hrs of climate change/carbon reduction training for supply chain staff
	More buildings are certified	FM97	+	Percentage of buildings achieving BREEAM IN-USE
 <p>Innovation Promoting Social Innovation</p>	Social innovation to create local skills and employment	FM98	✓	Innovative measures to promote local skills and employment
	Social innovation to create local skills and employment	FM99	✓	Innovative measures to promote and support responsible business
	Social innovation to enable healthier safer and more resilient communities	FM100	✓	Innovative measures to enable healthier, safer and more resilient communities
	Social innovation to safeguard the environment and respond to the climate emergency	FM101	✓	Innovative measures to safeguard the environment



Social Value
Portal



Jobs

Promote local skills and employment

Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1a, NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people directly employed on the contract, e.g. as a result of this procurement requirements (if you are the procuring organisation) or other set targets. If you are the bidding organisation or are reporting for measurement, only direct employees should be included here, while employment through supply chain can be captured through NT1c where this is included. Employees should be residing in the local area and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the definition of local area provided for the contract. Measure NT1b might signpost specific sub-localities specified in LIST NT1b. If you are recording direct employees under NT1b please ensure no double counting occurs. Please check evidence requirements for details on postcode collection.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for directly employing your target number of local people on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the number of qualifying employees directly employed on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome



Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1, NT1a, NT1c, as well as with NT18, NT18a, NT19, NT19a

Reporting

Local Economic Value

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people directly employed on the contract or employed through the supply chain. If you are a bidder you can include also jobs created through your own supply chain here. Recorded employees should be residing in the selected sub-localities (LIST NT1b) and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the list of specific sub-localities provided for this measure and for the specific contract (LIST NT1b). Please check evidence requirements for details on postcode collection. Include both direct employment and unlocked through the supply chain as a result of your procurement requirements. Should not be double counted with NT18/NT18a/NT19/NT19a. If you are recording direct employees under NT1 please ensure no double counting occurs.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, we ask you to calculate the full time equivalent (FTE) number of employees for the year. Please note that only employees with a contract duration that is at least one year or lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: Summarise your strategy for employing your target number of people from listed sub-localities on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome



Measurement

Unit: No. people FTE

Valuation

Proxy: £31,461.00

Value for the Individual: £31,461.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT1, NT1a, NT1b, as well as with NT18, NT18a, NT19, NT19a

Reporting

Local Economic Value

This measure should be reported as unlocked through the supply chain only

Technical Guidance

Definition: The full time annual equivalent (FTE) number of people employed on the contract by the supply chain as a result of your procurement requirements. Employees included should be residing in the local area and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the definition of 'local area' provided for the specific contract. Please check evidence requirements for details on postcode collection. Should not be double counted with NT18/NT18a/NT19/NT19a.

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your existing or planned requirements for the supply chain on local employment and their strategy for employing your target number of local people on this contract. For example, if they will advertise in local newspapers, please explain which ones and how regularly. Or, if they will cooperate with local job centres, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first half of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefit for the individual. Fiscal benefits to the government are excluded as they do not benefit the local area directly. UK median wage, Office of National Statistics (ONS) - Annual Survey of Hours and Earnings (ASHE) 2020. The proxy should be localised by using the same dataset and choosing the average across the relevant geographic area. Commitments and deliveries should not be reported as Social Value, but separately as Local Economic Value. An assessment of deadweight should be made for the specific project, by estimating what percentage of the project workforce would have been employed from the local area in a business as usual scenario. Proxy values over £1000 are rounded to the nearest Pound. Link to download localised figures <https://www.nomisweb.co.uk/query/construct/summary.asp?mode=construct&version=0&dataset=99>

IOOI Rating: Outcome

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Local Economic Value

Technical Guidance

Definition: This is the percentage of people directly employed or employed through the supply chain as a result of your procurement requirements on the contract that reside within the local area, over the overall number of people employed on the contract. Please refer to the definition of local area provided above for NT1.

Unit Guidance: Number of local residents employed (directly and through the supply chain as a result of your procurement requirements) over the total number of employees on the contract – (%).

Target Guidance: Specify the total number of people that will be employed on this contract. Of these, what is the total number of local people that will be employed on this contract? If you have not done so for NT1, NT1b or NT1c summarise your strategy for employing your target number of local people on this contract. For example, if you plan to advertise in local newspapers, please explain which ones and how regularly. Or, if you will cooperate with local job centres, please specify which ones and how you will approach engaging with them.

Evidence Requirements: Specify the total number of people employed on this contract and the total number of local people employed on this contract. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded not monetised. This indicator reflects how the pledged intervention differs e.g. from the business as usual scenario. We are working at producing benchmarks for specific categories of projects that will help understand "what good looks like".

IOOI Rating: Outcome

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Local Economic Value

Technical Guidance

Definition: An employer's fair is designed to showcase potential new jobs to local people. The fair should be organised in conjunction with an employment partner, such as the local authority. Such events are appropriate during both the construction and in-use phases and should include as many parts of the supply chain as appropriate for the stage. The event should be held in a place that local people can access, there should be suitable notification of the event to the local community via relevant communication channels such as social media and the local press, and it should last around 4 hours. Insert costs of putting on the events including hiring of spaces, stands and staff time. Please include the number of events and details of each in the Description. Useful links: <https://www.jobmonkey.com/jobfairs/career-events/>; <https://www.founders4schools.org.uk/educators/careers-fair/>

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at £16.09 per staff hour).

Target Guidance: Provide a breakdown of expected costs for each employer's fair that will be held. Provide details of your upcoming employer's fairs, e.g. place, time and expected number of attendees.

Evidence Requirements: Provide a breakdown of the costs incurred for each employer's fair held to encourage local employment. Provide details of each employer's fair, e.g. place, time and number of attendees.

Technical Proxy Rationale: Input proxy – this proxy captures the cost of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) pledged to Employers Fairs, held to encourage local employment in the area.

IOOI Rating: Input

Measurement

Unit: Y/N – Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This includes the existence of and facilitation of recognition agreements and of collective bargaining in the supply chain. Corporate policy and initiatives that encourage or facilitate both recognition agreements and collective bargaining in the supply chain can be included for evidencing. Relevant documents from suppliers also are to be provided for evidencing. For further government information please see the following link: <https://www.gov.uk/trade-union-recognition-employers>. Additional information on good practice can be found e.g. in UNISON's "Seeking recognition and achieving the best terms" report. (<https://www.unison.org.uk/content/uploads/2020/10/Seeking-recognition-and-achieving-the-best-terms-v8.pdf>).

Unit Guidance: Provide relevant documents.

Target Guidance: Please provide information on the situation of union recognition agreements or equivalent worker representation, as well as collective bargaining in the supply chain and how such engagement will be encouraged. Documentation and evidencing are to be provided. This can include among other things: supply chain data, past experiences, existing union recognition agreements or documentation that provides proof of equivalent worker representation, etc.

Evidence Requirements: Please provide information on the situation of union recognition agreements or equivalent worker representation, as well as collective bargaining in the supply chain and how such engagement has been encouraged. Documentation and evidencing are to be provided. This can include among other things: supply chain data, past experiences, existing union recognition agreements or documentation that provides proof of equivalent worker representation, etc.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: No. people FTE

Valuation

Proxy: £20,481.00

Value for the Individual: £18,693.21 (91.27%)

Value for the Government: £1,787.47 (8.73%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3a, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people directly employed as a result of a specific and deliberate employment initiative. Record the number of full time annual equivalent (FTE) employees taken on as a result of the contract that had been claiming Jobseeker’s Allowance (JSA) or Universal Credit unemployment benefits for at least the 12 months preceding the start of the employment contract. For a definition of long term unemployment see: <https://www.gov.uk/government/publications/predicting-likelihood-of-long-term-unemployment-the-development-of-a-uk-jobseekers-classification-instrument-wp116>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3a, NT3b, NT3c, NT3d, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of long-term unemployed people on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

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Measurement

Unit: No. people FTE

Valuation

Proxy: £14,782.00

Value for the Individual: £10,128.87 (68.52%)

Value for the Government: £4,652.69 (31.48%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of 16-24 yr. old employees taken on as a result of the contract that had not been in employment, education, or training (NEET) before the start of the employment contract. See the following link for a list of categories included: <https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/bulletins/youngpeoplenotineducationemploymentortrainingneet/november2019>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of people who are NEET on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) whether this is the first employment experience after having been NEET. For example, Employee 1: 3 months; full-time; 0.25 FTE; this is the first employment experience after being NEET. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Based on Unit Cost Database (UCDB) v2.0, E&E 9.0 and E&E9.1, updated to 2020/2021 prices. Based on people aged 18-24 and 16-17 who are Not in Education, Employment or Training (NEET) (Dec. 2019). Current costs and forgone benefits to the individual and the government associated with being NEET. Value to the individual comprises the loss of earnings to the young person whilst NEET (£10,534 for 18-24 y.o. and £5,177 for 16-17 y.o.). Fiscal value to the government comprises benefit payments (worklessness and housing benefits) and foregone tax and national insurance receipts (£4,984 for 18-24 y.o. and £606 for 16-17 y.o.). Deadweight combines the 41,3% of 18-24 y.o. NEETs being unemployed and the 39,7% of 16-17 y.o. NEETs being unemployed (Sept. 2020) with the off-JSA-benefit and off-UC/off-UC if it had been available in the area rates of 14,5% for 18-24 y.o. NEETs and 23% for 16-17 y.o. NEETs (Dec. 2019 - Nov. 2020). The employment data is sourced from Stat-Xplore (<https://stat-xplore.dwp.gov.uk/>). Deadweight should not be applied when the job opportunity would not have been created under the business as usual scenario. The proxy value is appropriate for the first year of employment. A red flag has been allocated in the UCDB v2.0 "in recognition of the global, top-down nature of the calculation, the age of the data, and the lack of consideration of wider fiscal elements such as costs associated with the health and/or crime impacts of being NEET." Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Outcome / Impact



Measurement

Unit: No. people FTE

Valuation

Proxy: £14,782.00

Value for the Individual: £10,128.87 (68.52%)

Value for the Government: £4,652.69 (31.48%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that were 16-25 years old at the start of the employment period, not in employment, education or training and that are care leavers. For definitions and resources around care leavers see: <https://www.gov.uk/childcare-parenting/children-and-young-people-leaving-care>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of care leavers on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) whether this is the first employment experience after having been care leavers. For example, Employee 1: 3 months; full-time; 0.25 FTE; this is the first employment experience after being care leaver. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for NEETs (NT5) and is it being used provisionally for this Measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT5 for the full Rationale.

IOOI Rating: Outcome / Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £24,527.00

Value for the Individual: £18,007.18 (73.42%)

Value for the Government: £3,734.71 (15.23%)

Value for the Community: £2,785.26 (11.36%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees aged 18+ taken on as a result of the contract that were within the rehabilitation period before the start of the employment contract. Support from Youth Offending Teams (<https://www.gov.uk/youth-offending-team>), Jobcentre Plus or other agencies carrying out specific programmes may be beneficial in identifying eligible individuals. For guidance about rehabilitation periods see: <https://www.gov.uk/exoffenders-and-employment>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of 18+ year old rehabilitating or ex-offenders on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that they were an 18+ year old rehabilitating or ex-offender before the start of the employment contract; that this is the first employment experience as an ex-offender. For example, Employee 1: 3 months; full-time; 0.25 FTE; was a 29 year old rehabilitating or ex-offender before the start of the employment contract; this is the first employment experience. Provide details of any organisation partnered with Information provided should be made compliant with data protection requirements (GDPR).

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Measurement

Unit: No. people FTE

Valuation

Proxy: £24,527.00

Value for the Individual: £18,007.18 (73.42%)

Value for the Government: £3,734.71 (15.23%)

Value for the Community: £2,785.26 (11.36%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: The proxy value comprises the value to the individual from entering the labour market (annualised increase in lifetime earnings), the fiscal value to the NHS resulting from an average reduction in health care costs associated with being out of work, as well as the economic, fiscal and wellbeing value to society from preventing reoffending. The figures included in the proxy are the UK values for the population aged 18+. All components are based on Unit Cost Database (UCDB) v2.0 figures, updated to 2020/2021 prices, and MOJ prevention of reoffending statistics. See UCDB v2.0 for a more detailed description of unemployment and crime costs. An across-crimes crime multiplier of 4.3 has been applied to reflect the ratio of estimated total number of crimes (based on the Crime Survey for England and Wales, formerly British Crime Survey) to the number of comparable crimes recorded by the police (a UK weighted average of crime type multipliers - weighted according to the 2015/2020 distribution of reported crimes by typology - derived by GMCA Research Team and presented in the UCDB v2.0). A 3.96 multiplier has been applied to the average number of offences per offender, to take into account unproven offences (based on MOJ Crime statistics). The figures included in the proxy are the UK level values for the population aged 18+. They can be localised by choosing average reoffending figures for the relevant geographical area. Deadweight is established separately to reflect the reduction in reoffending probabilities for employed rehabilitating offenders (dw: 91%), and the average probability for rehabilitating offenders to be employed respectively (dw: 17%). Deadweight figures should be adjusted to reflect primary data from the project when available, e.g. by using success rates in preventing reoffending from a rehabilitating offender programme run in partnership with (or by) a VCSE. The proxy

value is appropriate for the first year of employment. For succeeding years of continued employment, it should be adjusted to reflect an increased probability of finding a job. Value to the individual or business who suffered the crime is £18,007, the value to the government is £3,735 and the value to society is £2,785. These have been calculated based on the UCDB v2.0 Economic, Fiscal and Social components and Comments. Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Impact

Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,787.47 (10.89%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that are disabled. A disabled person is defined as "someone with a physical or mental impairment that has a 'substantial' and 'long-term' effect on their ability to do normal daily activities" (Equality Act 2010). For guidance about employing disabled people and support programmes for employers please see: <https://www.gov.uk/government/publications/employing-disabled-people-and-people-with-health-conditions/employing-disabled-people-and-people-with-health-conditions>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. all NT3s, NT4, all NT5s, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of disabled people on this contract. For example, it is likely you will need to cooperate with job centres, care homes or charities so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE). For example, Employee 1: 3 months; full-time; 0.25 FTE. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

See Next Page

Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,787.47 (10.89%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4a, NT5, NT5a, NT6, NT6a

Reporting

Social Value

Technical Proxy Rationale: Based on Unit Cost Database v2.0, E&E 2.0, updated to 2020/2021 prices. This proxy is based on "illustrative estimate by the Department of Work and Pensions (DWP) of the costs and benefits that would occur if some hypothetical 'typical' ESA WRAG (Work-Related Activity Group) claimant (who would otherwise have remained on benefits) were to move into employment for one additional year" (see UCDB v2.0 for a more detailed description). Value to the individual comprises increased earnings as a result of entering employment. Value to the government includes savings to the NHS related to a reduction in health care costs associated with being out of work. Fiscal benefits to the DWP have been excluded. Deadweight is based on the statistic that 50% of disabled unemployed are very likely to be long term unemployed. Therefore the deadweight figure is a weighted average of the probability of finding a job for a long-term unemployed person (4.62%) and the generic probability of finding a job for the generic JSA claimant (the deadweight value has been adjusted for the recent COVID impacts on the UK labour market, based on Nov. 2019 - Oct. 2020 data and inferences from the impact of the 2008/09 financial crisis). The proxy value is appropriate for the first year of employment. For succeeding years of continued employment it should be adjusted to reflect the increased probability of finding a job. Proxy values over £1000 are rounded to the nearest Pound.

IOOI Rating: Impact



Measurement

Unit: No. people FTE

Valuation

Proxy: £16,420.00

Value for the Individual: £14,786.85 (90.05%)

Value for the Government: £1,633.12 (9.95%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT3, NT3a, NT3b, NT3c, NT3d, NT4, NT4a, NT5, NT5a, NT6

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and can only be applied once per employee, for the first year of employment. This is to record people employed as a result of a specific and deliberate employment initiative. Record the full time annual equivalent (FTE) number of employees taken on that are armed forces veterans facing barriers to employment due to a disability. A disabled person is defined as "someone with a physical or mental impairment that has a 'substantial' and 'long-term' effect on their ability to do normal daily activities" (Equality Act 2010). For guidance about employing disabled people and support programmes for employers please see: <https://www.gov.uk/government/publications/employing-disabled-people-and-people-with-health-conditions/employing-disabled-people-and-people-with-health-conditions>. For definitions and resources around veterans see: <https://www.gov.uk/government/organisations/veterans-uk>. The value is additional to NT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply. Entries should not be double counted with any additional initiatives around employment from disadvantaged groups in this outcome (e.g. NT3, NT3a, NT3b, NT3c, NT3d, NT4, NT5, NT6, etc).

Unit Guidance: The proxy value can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, please calculate the full time equivalent (FTE) number of employees for the year. Please note that only direct employees with a contract duration that is at least one year or that lasts the full duration of the contract (if this is shorter than one year) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week.

Target Guidance: Summarise your strategy for employing your target number of disabled armed forces veterans on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

Evidence Requirements: Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE). For example, Employee 1: 3 months; full-time; 0.25 FTE. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Please note this is the proxy for disabled people employed (NT6) and is being used provisionally for this measure. At procurement, the procuring organisation can use prioritisation coefficients to signpost this Measure to bidders. See NT6 for the full Rationale.

IOOI Rating: Impact



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT8, NT11

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to individual or group employment support. Units targeted or claimed within this Measures should not be double counted with other similar Measures, including NT11.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people. The cumulative number across sessions should be reported.

Target Guidance: Summarise your strategy for supporting unemployed people into work (including the number of staff hours to be spent and the number of people to be supported). For each session, the number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours. The cumulative number across sessions should be reported. Describe the activity/activities to be carried out and provide details of any partner organisations you will work with.

Evidence Requirements: Specify the number of sessions, and for each session specify the duration, the number of staff providing unemployment support and the number of unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a sectoral shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Combined % of women hired on contract as fulltime annual equivalent (FTE) directly and through the supply chain. This Measure encourages increased hiring of women.

Unit Guidance: Number of women hired on the contract over the total number of people hired on the contract - (%). Please provide calculation both in original number of contracts and converted to FTE for comparison with other employment indicators. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: Summarise your expected combined % share of women hired on contract (FTE) directly and through the supply chain.

Evidence Requirements: Provide information on the % share of women working on contract (FTE). The provided data has to be supported by official company employment statistics or other documentation. If the data includes supply chain data suppliers have to provide the respective documentation. The data has to be adjusted for FTE employment to allow for comparability between different kinds of contracts.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: Combined % of BAME (black, asian, minority ethnic) hired on contract as fulltime annual equivalent (FTE) directly and through the supply chain. This Measure encourages increased hiring of BAME.

Unit Guidance: Number of BAME hired on the contract over the total number of people hired on the contract - (%). Please provide calculation both in original number of contracts and converted to FTE for comparison with other employment indicators. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full time basis for a period of 12 months. For example, two people employed full time for six months would equal 1.0 FTE. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements. Do not double count direct and supply chain employment for the same areas with other relevant measures.

Target Guidance: Summarise your expected combined % share of BAME (black, asian, minority ethnic) hired on contract (FTE) directly and through the supply chain.

Evidence Requirements: Provide information on the % share of BAME (black, asian, minority ethnic) working on contract (FTE). The provided data has to be supported by official company employment statistics or other documentation. If the data includes supply chain data, suppliers have to provide the respective documentation. The data has to be adjusted for FTE employment to allow for comparability between different kinds of contracts.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Any specific initiatives or recruitment programmes in place for this contract that target women. This can include programmes in place with suppliers.

Unit Guidance: Upload initiatives' plan/report.

Target Guidance: Summarise planned programmes that will target women or a recruiting of women for this contract. This can include planned programmes in place with suppliers.

Evidence Requirements: Provide evidence on initiatives or recruitment programmes in place on the contract that target women. This can include general information on the programmes and would ideally include information on how they were implemented and the impact they had. If programmes in place with suppliers are included, the respective suppliers have to provide the necessary information.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Any specific initiatives or recruitment programmes in place for this contract that target BAME (black, asian, minority ethnic). This can include programmes in place with suppliers.

Unit Guidance: Upload initiatives' plan/report.

Target Guidance: Summarise planned programmes that will target BAME (black, asian, minority ethnic) or a recruiting of BAME for this contract. This can include planned programmes in place with suppliers.

Evidence Requirements: Provide evidence on initiatives or recruitment programmes in place on the contract that target BAME (black, asian, minority ethnic). This can include general information on said programmes and would ideally include information how they were implemented and the impact they had. If programmes in place with suppliers are included the respective suppliers have to provide the necessary information.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



Measurement

Unit: No. staff hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT11

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to the preparation and delivery of curriculum related activities including literacy support, career talks, safety talks, etc. Please provide a description of the range of activities provided. Units targeted or claimed within this Measures should not be double counted with other similar Measures, including NT17 and NT29.

Unit Guidance: Example: if 10 staff have spent 3 hours each, then the total number of hours reported should be 30.

Target Guidance: Summarise your workplan for delivering your target number of local school and college visits. Provide a breakdown of the number of staff hours to be spent on each visit (preparation versus delivery). For example, if 10 staff will spend 3 hours each, then the total number of hours reported should be 30.

Evidence Requirements: Provide the names of the schools/colleges visited and a breakdown of the number of staff hours spent on each visit (including time spent preparing and then delivering the session). For example, if 10 staff have spent 3 hours each on a visit, then the total number of hours reported for that visit should be 30. Describe the visits and the activities delivered and provide any supporting information, e.g. a confirmation from the school/college after the visit. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering. It is based on the Office of National Statistics (ONS) hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



Measurement

Unit: No. of visits

Valuation

Proxy: £64.36

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £64.36 (100%)

Reporting

Social Value

Technical Guidance

Definition: Site visits for local school children should be organised in tandem with local schools. They should last between approx. 30-60mins and include a short presentation about the project (e.g. a new building) and how it will benefit the area. The primary objective of the event is to encourage young people to consider a career in the projects primary industry or sector, such as construction or facilities management, including an overview of the variety of roles and possible career options for students, even if they are young students. The event should also be used to make school children aware of the dangers relating to the project, such as trespassing on the site out of hours. Useful links: <https://www.goconstruct.org/routes-into-construction/experience-construction/visit-a-construction-site/>.

Unit Guidance: Record no. of visits (assumed to be 30-60 minutes each).

Target Guidance: Summarise your strategy for delivering your target number of site visits for school children or local residents. Describe and provide details of the site visits including the duration and expected number of attendees per visit. Provide the names of the schools/colleges that will be involved.

Evidence Requirements: Describe and provide details of each site visit, including the duration and the number of school children or local residents attending each site visit. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy value for site visits for school children or local residents is based on the assumed duration of a site visit including preparation, valued at volunteering rate (£16.09 per hour).

IOOI Rating: Input

Measurement

Unit: Y/N - Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: The measure aims to facilitate and record own and supply chain staff engagement with Continuing Professional Development (CPD) activities based on individual interests, needs and priorities. The aim is to enable and encourage staff to participate in activities relating to personal professional development. This means that staff participation in CPD activities should be centred around professional development that facilitates skills development based on individual interests, needs and priorities, thereby going beyond company needs.

Unit Guidance: Please provide information on whether any policy is in place at company level and/or in the supply chain. Please evidence how any contract related staff, own and supply chain, benefited from this policy in terms of CPD.

Target Guidance: Please outline whether your company and/or your supply chain plan to put in place a policy that aims to facilitate and record staff engagement in Continuing Professional Development (CPD) activities. This can include working with specific CPD providers or offering CPD related workshops, seminars or courses to staff. Please also provide information on how own and supply chain staff on contract are projected to benefit from and access any CPD opportunities on offer and how you ensure staff participation in CPD activities is centred around staff interests, needs and priorities. For further information see e.g. <https://cpduk.co.uk/explained>.

Evidence Requirements: Please outline your company and/or your supply chain policy that aims to facilitate staff engagement in Continuing Professional Development (CPD) activities. This can include working with specific CPD providers or offering CPD related workshops, seminars or courses to staff. Please also provide information on how own and supply chain staff on contract benefited from and accessed any CPD opportunities on offer and how you ensured staff participation in CPD activities was centred around staff interests, needs and priorities. For further information see e.g. <https://cpduk.co.uk/explained>.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



Measurement

Unit: No. weeks

Valuation

Proxy: £286.47

Value for the Individual: £286.47 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT11

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of training opportunities created specifically for the contract or that are made use of on contract can be counted, for those weeks during which a person works primarily on contract. Only vocational training opportunities supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT10 and other Measures around apprenticeships or vocational qualifications.

Unit Guidance: Record weeks of vocational qualification training provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as it will be supported to completion.

Target Guidance: Summarise your strategy for providing your target number of weeks of training for vocational qualifications on this contract, including details of how you will support completion of the qualifications. If possible, provide details of the accredited training provider, the type and the level of the outcomes to be achieved as well as the resulting qualification.

Evidence Requirements: Specify the number of people in vocational qualification training on this contract and the number of weeks of training per person. Provide details of the accredited training provider, the type and the level of the outcomes achieved as well as the resulting training qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

Technical Proxy Rationale: The proxy value has been computed combining the current economic benefit to the individual (based on minimum pay given the distribution of achievements by age and their average length), and the annualised future lifetime value to society of achieving the qualification (based on Unit Cost Database (UCDB) v2.0 updated to 2020/2021 prices, and the distribution of achievements by level). Value to the individual therefore includes current increased earnings and annualised value of future increased earnings as a result of achieving the qualification. It is the lower estimate, and reflects an assumption that 50% of the employment benefit is attributed to the qualification (see UCDB v2.0 for details). Estimates of distribution of achievements by age, average length, and level are based on data from the FE data library: further education and skills (<https://www.gov.uk/government/statistical-data-sets/fe-data-library-vocational-qualifications--2>), and BIS Returns to Intermediate and Low Level Vocational Qualifications, 2011. Per week attribution of lifetime benefits is based on the assumption that each week equally contributes to achieving the qualification. This assumption is likely to be revisited in future editions, to pick up on non-linearities.

IOOI Rating: Impact



Measurement

Unit: No. weeks

Valuation

Proxy: £224.07

Value for the Individual: £224.07 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT9a, NT10a, NT10b

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of apprenticeships created specifically for the contract or that are made use of on contract can be counted, for those weeks during which apprentices work primarily on contract. Only apprenticeships supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT9.

Unit Guidance: Record weeks of training for the apprenticeships provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as the apprenticeship will be supported to completion.

Target Guidance: Summarise your strategy for providing the target number of apprenticeship weeks on this contract, including details of how you will support completion of the apprenticeships. If possible, provide details of the accredited training provider, the type and the level of the apprenticeships to be achieved as well as the resulting qualifications. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Evidence Requirements: Specify the number of people on apprenticeships on this contract and the number of apprenticeship weeks per person. Provide details of the accredited training provider, the type and the level of the apprenticeship achieved, as well as the resulting qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Technical Proxy Rationale: The proxy value has been computed combining the current economic benefit to the individual (based on minimum pay given the distribution of achievements by age and their average length), and the annualised future lifetime value to society of achieving an apprenticeship (based on Unit Cost Database (UCDB) v2.0 updated to 2020/2021 prices, and the distribution of achievements by level and gender). If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider. Value to the individual therefore includes current increased earnings and annualised value of future increased earnings as a result of achieving the qualification. It is the lower estimate, and reflects an assumption that 50% of the employment benefit is attributed to the qualification (see UCDB v2.0 for details). Estimates of distribution of achievements by age, average length, and level are based on data from the FE data library: further education and skills (<https://www.gov.uk/government/statistical-data-sets/fe-data-library-further-education-and-skills> and <https://www.gov.uk/government/statistical-data-sets/fe-data-library-apprenticeships>). Per week attribution of lifetime benefits is based on the assumption that each week equally contributes to achieving the qualification. This assumption is likely to be revisited in future editions, to pick up on non-linearities.

IOOI Rating: Impact



FM17a

Theme: Jobs – Promote Local Skills and Employment

Outcome: Improved skills for disadvantaged people

Measure: No. of weeks of training opportunities on the contract (BTEC, City & Guilds, NVQ, HNC) that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+ - delivered for groups specified in 'LISTNT9a' (e.g. NEETs, under-represented gender and ethnic groups, disabled, homeless, rehabilitating young offenders)

Measurement

Unit: No. weeks

Valuation

Proxy: £286.47

Value for the Individual: £286.47 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT10, NT10a, NT10b

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of training opportunities created specifically for the contract or that are made use of on contract can be counted, for those weeks during which a person works primarily on contract. Please refer to the list of target groups specified for this Measure on the contract (LIST NT9a). Only vocational training opportunities supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT10 and other Measures around apprenticeships or vocational qualifications.

Unit Guidance: Record weeks of training provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as it will be supported to completion.

Target Guidance: Summarise your strategy for providing your target number of weeks of training for vocational qualifications on this contract and for engaging with the listed target categories (LIST NT9a), including details of how you will support completion of the qualifications. If possible, provide details of the accredited training provider, the type and the level of the outcomes to be achieved as well as the resulting qualification. If you are going to work with a charity or third sector partner to reach the targeted group, please provide details for those.

Evidence Requirements: Provide evidence of how you have reached the targeted categories - e.g. targeted upskilling programme reports or documented partnerships with a relevant third sector organisation. Specify the number of people in training on this contract including the number of weeks of training per person. Provide details of the accredited training provider, the type and the level of the outcomes achieved as well as the resulting training qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification.

Technical Proxy Rationale: Please note that this proxy value does not capture the additional specificity of the target groups the opportunity is being provided for, it is the same proxy value of NT9. At procurement only, a prioritisation weighting can be used to differentiate the two measures if appropriate. See NT9 for the full rationale.

IOOI Rating: Impact



FM18a



Theme: Jobs – Promote Local Skills and Employment

Outcome: Improved skills for disadvantaged people

Measure: No. of weeks of apprenticeships on the contract that have either been completed during the year, or that will be supported by the organisation to completion in the following years - Level 2,3, or 4+ - delivered for groups specified in 'LIST NT10a' (e.g. NEETs, under-represented gender and ethnic groups, disabled, homeless, rehabilitating young offenders).

Measurement

Unit: No. weeks

Valuation

Proxy: £224.07

Value for the Individual: £224.07 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT9a, NT10, NT10b

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of apprenticeships created specifically for the contract or that are made use of on contract can be counted, for those weeks during which apprentices work primarily on contract. Please refer to the list of target groups specified for this Measure on the contract (LIST NT10a). Only apprenticeships supported to completion should be counted, even when that completion will occur after the end of the contract. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find registered qualifications see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT9.

Unit Guidance: Record weeks of training for the apprenticeships provided on the contract for categories in LIST NT10a . Apprenticeships must be supported to completion, even if this support extends beyond the duration of the contract.

Target Guidance: Summarise your strategy for providing the target number of apprenticeship weeks on this contract, as well as your strategy for engaging with the listed target categories (LIST NT10a), including details of how you will support completion of the apprenticeships. If possible, provide details of the accredited training provider, the type and the level of the apprenticeships to be achieved, as well as the resulting qualifications. Provide details of any charity or third sector partner you plan to work with to reach the targeted group. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Evidence Requirements: Provide evidence of how you have reached the targeted categories, e.g. targeted upskilling programme reports or documented partnerships with a relevant third sector organisation. Specify the number of people on an apprenticeship on this contract and the number of weeks of apprenticeship per person. Provide details of the accredited training provider, the type and the level of the apprenticeships achieved as well as the resulting qualification. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Technical Proxy Rationale: The proxy value does not capture the additional specificity of the target groups the opportunity is being provided for, it is the same proxy value as NT10. If an apprenticeship has been part-financed through the apprenticeship levy, attribution must be applied to account for reduced costs of provision for the apprenticeship provider. At procurement only, a prioritisation weighting can be used to differentiate NT10 and NT10a, if appropriate. See NT10 for the full rationale.

IOOI Rating: Impact



Measurement

Unit: No. staff volunteering hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: Digital skills can include a range of technical and operational, as well as higher order cognitive, social and attitudinal, skills and abilities, as specified by DBIS in their January 2016 DIGITAL SKILLS for the UK ECONOMY report (https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/492889/DCMSDigitalSkillsReportJan2016.pdf). In practice this includes IT, Computer, Media, and Digital literacy that enable a person to consume and produce products in a way that allows and facilitates societal and economic participation. This refers to training provided by staff during paid staff hours.

Unit Guidance: This is the number of paid staff hours spent delivering training for digital skills development to disadvantaged people, multiplied by the number of disadvantaged people (attendees) training was delivered to.

Target Guidance: Please provide information on the expected structure, content, and target audience of the training for digital skills development to be provided. Describe how the structure and content will enable attendees to expand their digital skills and provide information on how skills development will be tracked. Provide information on the disadvantaged people you plan to work with, including information on your specific targeting, participant eligibility, outreach, and engagement strategy. Please also provide information on any organisation you plan to partner with to develop this training, as well as the number of staff work hours expected to be spent providing this training.

Evidence Requirements: Please provide information on the structure, content, and target audience of the training for digital skills development that has been provided. Provide information on how the structure and content has enabled attendees to expand their digital skills and how skills development has been monitored and tracked, as well as information on the disadvantaged people you worked with. Provide information on any organisation you partnered with to develop this training, as well as the number of staff work hours spent providing this training.

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering. It is based on the Office of National Statistics (ONS) hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). The proxy can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input

Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Training programmes for people to acquire skills for the low carbon economy and renewable technologies (e.g. technical feasibility analysis, solar system design, solar panel installation, energy efficiency, community engagement). For guidance on initiatives see "A toolkit for city regions and local authorities", Ashden - examples include Repowering's Youth Training programme (<https://www.repowering.org.uk/>). Examples for traditionally high carbon industries are: Non-renewable energy and fuels (e.g. coal, oil and gas), materials (e.g. chemicals, iron and steel, cement, forestry), transportation.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Describe the programme you are planning to deliver, the number of people benefitting that are in "traditional" high carbon industries and also the number of hours of training planned for each participant. Describe any certificates or qualifications that will be achieved.

Evidence Requirements: Describe the nature and relevance of the training, and any certificates or qualifications achieved. Report the number of employees in high carbon industries that have benefitted, and number of hours of training provided.

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: No. weeks

Valuation

Proxy: £224.07

Value for the Individual: £224.07 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT9, NT9a, NT10, NT10a

Reporting

Social Value

Technical Guidance

Definition: This Measure applies to direct employees only and does not include staff upskilling. Time spent as part of apprenticeships created specifically for the contract or that are made use of on contract, can be counted for the weeks during which apprentices work primarily on contract. This Measure should be used specifically for apprenticeships relevant to the low carbon economy (Relevant activity areas include renewable energy production and distribution; environmental consulting services; technical and advisory services; water, sewage and waste sustainable management; supporting manufacturing services; remodelling and renovation services; installation and repair services, etc). Only apprenticeships supported to completion should be counted. For a description of the qualification levels see: <https://www.gov.uk/what-different-qualification-levels-mean/overview>. To find a registered qualification see: <https://www.gov.uk/find-a-regulated-qualification>. The social value proxy is appropriate for opportunities that are for new employees, not existing employees. Should not be double counted with NT10, NT10a, or similar Measures.

Unit Guidance: Record weeks of training for the apprenticeships provided on the contract, even when the opportunity is supported beyond the duration of the contract, as long as the apprenticeship will be supported to completion.

Target Guidance: Summarise your strategy for providing the target number of apprenticeship weeks on this contract, including details of how you will support completion of the apprenticeships. If possible, provide details of the accredited training provider, the type and the level of the apprenticeships to be achieved as well as the resulting qualifications and relevance for the low carbon economy. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Evidence Requirements: Specify the number of people on apprenticeships on this contract and the number of apprenticeship weeks per person. Provide details of the accredited training provider, the type and the level of the apprenticeship achieved, as well as the resulting qualification and its relevance for the low carbon economy. Information provided should be made compliant with data protection requirements (GDPR). Provide information on the number of weeks provided by level of qualification. If an apprenticeship has been part financed through the apprenticeship levy attribution has to be applied, to account for reduced costs of provision for the apprenticeship provider.

Technical Proxy Rationale: The proxy value does not capture the additional specificity of the target groups the opportunity is being provided for, it is the same proxy value as NT10. If an apprenticeship has been part-financed through the apprenticeship levy, attribution must be applied to account for reduced costs of provision for the apprenticeship provider . At procurement only, a prioritisation weighting can be used to differentiate NT10 and NT10b, if appropriate. See NT10 for the full rationale.

IOOI Rating: Impact



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £105.50

Value for the Individual: £105.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT7, NT8

Reporting

Social Value

Technical Guidance

Definition: This is the number of staff hours dedicated to individual or group employment support specifically for people under 24 years old. This Measure requires support to be targeted and focussed on the participating individuals. Group sessions should therefore be of a size that allows for individuals to be supported based on their specific needs. Units targeted or claimed within this Measure should not be double counted with other similar Measures including NT7.

Unit Guidance: The number of units reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of the number of people delivering the session.

Target Guidance: Summarise your strategy for supporting unemployed people into work (including the number of staff hours to be spent and the number of people to be supported). Describe the activity/activities to be carried out and provide details of any partner organisations you will work with.

Evidence Requirements: Specify number of sessions, and for each session the duration, number of staff providing unemployment support and unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 16 pricing points from 11 different companies offering cv advice and job interview coaching, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a shift to digital service provision. While the price is reduced a case can be made for higher need for this measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output

Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Aimed at anyone (school or college pupils, local residents) interested in entering into the primary project industry or sector. They should include taster days across all professions relating to this primary sector, such as including construction, design and building management in the case of real estate. May be organised by any member of the professional team. The day needs to be properly managed with opportunities for young people to get a view of all aspects of the industry. Insert costs of putting on the events including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour). Please include the number of events and details of each in the Description. Useful links: <http://opendoors.construction/>

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour).

Target Guidance: Provide a breakdown of expected costs for each employment taster day to be held. Describe and provide details of your upcoming employment taster days, e.g. place, time and expected number of attendees.

Evidence Requirements: Provide a breakdown of the costs incurred for each employment taster day. Describe and provide details of each employment taster day, e.g. place, time and number of attendees. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) pledged to Employment taster days for those interested in working in the primary project sector, such as the real estate and construction industry. Staff time should be measured at £16.09 per staff hour.

IOOI Rating: Input



Measurement

Unit: No. weeks

Valuation

Proxy: £168.72

Value for the Individual: £168.72 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. Only work placements for students with a duration of 1 to 6 weeks (typically unpaid) should be registered here. The cumulative number of weeks (from 1 to 6 for each student work placement) should be registered. This Measure does not apply to placements longer than 6 weeks as the TOMs discourage unpaid long-term employment.. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships>. Should not be double counted with other work placement Measures.

Unit Guidance: Number of total student placement weeks on the contract (only student placements between 1-6 weeks).

Target Guidance: Summarise your strategy for providing your target number of weeks of student work placements or pre-employment courses on this contract. Specify the type of student work placements or/and pre-employment courses that will be provided, including what kind of industry-based experience they will result in and how. As you will cooperate with schools, colleges, or universities, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of people in student work placements or pre-employment courses on this contract, and for each person specify: the duration in weeks and type of the work placement or pre-employment course. Describe the industry-based experience gained and provide details of the school, college or university partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current equivalent economic benefit to the individual from equivalent increased earnings, based on minimum pay given the distribution of apprenticeships achievements by age.

IOOI Rating: Output



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £168.72

Value for the Individual: £168.72 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. The cumulative number of weeks of work placements (noting that each placement must last 6 weeks or more) should be registered. This Measure does not apply for placements shorter than 6 weeks as meaningful learning opportunities should be promoted.. Only placements paid at least minimum or national living wage, as per governmental regulations, should be included. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships> and here <https://www.gov.uk/national-minimum-wage-rates>. Should not be double counted with NT12 or similar work placement Measures.

Unit Guidance: Number of weeks in total on the contract (note that each placement must be at least 6 weeks).

Target Guidance: Summarise your strategy for providing your target number of positions and weeks of paid work placements on this contract. Specify the type of work placements (as well as pay type, i.e. minimum wage, national living wage or higher wage) that will be provided, including what kind of industry-based experience they will result in and how. If you will partner with any organisations, schools, colleges or universities, please specify which you will partner up with and how you will approach these.

Evidence Requirements: Specify the number of people in work placements, and for each person specify the following: the duration in weeks and type (including pay type, i.e. minimum wage, national living wage, higher wage) of the work placement. Describe the industry-based experience gained and provide details of any organisations, schools, colleges or universities that you have partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current economic benefit to the individual from actual minimum increased earnings, based on minimum pay given the distribution of apprenticeship achievements by age.

IOOI Rating: Output



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £332.50

Value for the Individual: £332.50 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Work placements indicate a temporary work experience within a company, for example working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. The cumulative number of weeks of work placements (noting that each placement must be longer than 6 weeks) should be registered. Only placements paid at least UK Real Living Wage, as defined by the Living Wage Foundation should be included. For guidance please see: <https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships> and here <https://www.livingwage.org.uk/>. Units targeted or claimed should not be double counted with similar work placement Measures.

Unit Guidance: Number of weeks in total on the contract.

Target Guidance: Summarise your strategy for providing your target number of positions and weeks of paid work placements on this contract. Specify the type of work placements (as well as pay type, i.e. UK Real Living Wage, London Living wage, or higher wage) that will be provided, including what kind of industry-based experience they will result in and how. If you will cooperate with any organisation, school, college or university, please specify which ones and how you will approach this.

Evidence Requirements: Specify the number of people in work placements, and for each person specify: the duration in weeks and type (including pay type, i.e. UK Real Living Wage, London Living wage, or higher wage) of the work placement. Describe the industry-based experience gained and provide details of any organisation, school, college or university partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Current economic benefit to the individual from actual minimum increased earnings, based on based on UK Real Living Wage pay.

IOOI Rating: Output



Social Value
Portal



Growth

Supporting growth of responsible
regional business



Measurement

Unit: £

Valuation

Proxy: £0.12

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.12 (100%)

Reporting

Social Value

Technical Guidance

Definition: Amount spent on suppliers for the contract that are voluntary, community or social enterprises. This might include e.g. choosing a catering company that employs rehabilitating offenders, or a furniture service that recycles donated furniture, or a social enterprise recruitment consultancy, etc. Social Enterprise UK have a useful tool to identify social enterprises that have membership with them based on location <https://directory.socialenterprise.org.uk/seuk/en/seuk-members/>. You may refer to the local economic development team in the council to identify potential partners. This is the additional SV (SVA) from spending with a VCSE. A relevant SROI multiplier can be substituted to this default value when available and assured, by using the additional multiplier column in the Measurement Calculator. The total SVA from selecting a local VCSE in the supply chain can be computed by adding the appropriate NT14 and NT18 multipliers, when NT18 or NT19 are not directly included in the analysis. Should not be double counted with NT18 and NT19 or other relevant Measures if those are included.

Unit Guidance: £ spent with VCSEs in the supply chain. Note that they do not need to be local VCSEs. Please see the Rationale for more on double counting.

Target Guidance: Provide a breakdown of the estimated pounds to be spent with VCSEs in your supply chain on this contract, including the name of the VCSEs (or a range of potential names) and the type of goods/services to be procured from each.

Evidence Requirements: Provide a breakdown of pounds spent with VCSEs within your supply chain on this contract, including the name of the VCSEs and the type of goods/ services procured from each

Technical Proxy Rationale: Value to society resulting from average financial resources reinvested by VCSEs in their social mission (lower bound based on SEs). Assumed average profitability of 25%, wage differential with respect to non-VCSEs of 12.5% (there is about a 12.5% differential between the national Living Wage and the minimum wage for +25 y.o.), and average of 35% of profits reinvested into social purpose. An amber robustness assessment has been attributed given the relative scarcity of specific data and statistics on the various differentials for VCSEs. This is the additional SV (SVA) from spending with a VCSE. A relevant SROI multiplier can substituted to this default value when available and assured, by using the additional multiplier column in the Measurement Calculator. The total SVA from selecting a local VCSE in the supply chain can be computed by adding the appropriate NT14 and NT18 multipliers, when NT18 or NT19 are not directly included in the analysis (i.e. if doing so please avoid double counting by only recording the same spend under one Measure).

IOOI Rating: Input / Output



Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (e.g. financial advice / legal advice / HR advice / HSE) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs). Please include only the amount of volunteering that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. Please note that MSMEs are defined as (0-250 employees) - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, and NT29. Please check also other relevant expert time Measures included.

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice to VCSEs/MSMEs. Provide the names of the VCSEs/MSMEs you will support or a range of options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advice/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (specifically around decarbonisation) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs) to achieve net zero carbon. In line with international ambitions, it is advised to aim for a reduction of emissions to net zero as soon as possible, with 2050 being the minimum target reflecting current UK government policy and an earlier target to be strongly encouraged. Many private sector organisations, sectoral institutions such as the World Green Building Council and more than 100 LAs have set the more ambitious 2030 target. Please include only the number of hours of expert staff time that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. MSMEs are defined as 0-250 employees - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, and NT29. Please check also other relevant expert time Measures included..

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice around decarbonisation to VCSEs/MSMEs to achieve net zero carbon. Provide the names of the VCSEs/MSMEs you will support or details of proposed options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert decarbonisation advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent supporting each VCSE/MSME, the type of expert advice provided, as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advise/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Relevant activities include donating a van to a community organisation or the use of office accommodation, etc. Equivalent £ value should be calculated and assumptions and details about the calculation should be made explicit. Attribution might need to be taken into account where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the toolkit guidance document for worked examples on attribution. Should not be double counted with N17 and NT28 and other Measures around donation of equipment or resources.

Unit Guidance: Equivalent £ value of the donation.

Target Guidance: Provide a list of VCSEs you have already identified or a range of options. Provide a breakdown of the value of resources and/or equipment to be donated to VCSEs, including the names of the VCSEs.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the VCSEs. This proxy is based on primary data, a pre-determined value cannot be established. A resource-specific valuation exercise of the assets should be carried out and accurately described.

IOOI Rating: Output



Measurement

Unit: No. staff expert hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: Volunteering is defined by the International Labour Organisation (2001) as ‘unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household’. Here, only staff volunteering hours should be recorded when time has been allocated for staff to spend on formal volunteering (not for family and friends). Please include only the amount of volunteering that has been provided by staff during working hours or on paid overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked examples on attribution. The following Measures should not be double counted : NT15, NT16, NT24, NT25, NT26, NT27, NT28, and NT29 and other volunteering Measures.

Unit Guidance: Number of staff hours spent on volunteering with VCSEs. For example, if 10 staff volunteer 3 hours each, then the reported total should be 30.

Target Guidance: Specify the list of VCSEs that are going to be supported and describe the volunteering activities to be delivered and their intended purposes. Provide a breakdown of staff volunteering hours to be delivered to VCSEs. For example, if 10 staff volunteer 3 hours each, then the reported total should be 30.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the details of the VCSEs/MSMEs you have supported. Specify the number of staff hours spent for each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering. It is based on the Office of National Statistics (ONS) hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkintheuk/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Local Economic Value

Technical Guidance

Definition: Opportunity for local suppliers, especially MSMEs and VCSE, to understand the potential of providing their services, goods or works to the development throughout its lifecycle from construction through to management and occupation. Providers need to ensure that the event is properly advertised and that specific opportunities have been identified. Where possible, providers should also invite potential suppliers whom they think may be able to benefit. Advice about how to tender successfully should be made available. Insert cost of putting on the events including hiring of spaces, stands and staff time (staff time can be captured at 16.09 £ per staff hour). Please include the number of events and details of each in the Description. Useful links: <https://www.cips.org/en-GB/supply-management/opinion/2014/november/how-to-revitalise-your-meet-the-buyer-events/>

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour)

Target Guidance: Provide a breakdown of expected costs for Meet the Buyer events to be held for this contract. Provide details of your upcoming Meet the Buyer event(s), e.g. place, time and expected number of attendees. Also provide names of attending supply chain organisations. Information provided should be made compliant with data protection requirements (GDPR).

Evidence Requirements: Provide a breakdown of costs incurred for Meet the Buyer events held for this contract. Provide details of each Meet the Buyer event, e.g. place, time and number of attendees. Also provide names of attending supply chain organisations. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy captures the cost of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) pledged to Meet the Buyer events held to highlight local supply chain opportunities.

IOOI Rating: Input / Output



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18a, NT19, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18a, NT19 and NT19a.

Unit Guidance: Total amount of £ spent with the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific basis to identify the % increase in local spend with respect to the business-as-usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business-as-usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT19, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the specified sub-localities identified for the contract in list NT18a. This should be calculated as the cumulative spend with suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18, NT19 and NT19a and other relevant spend Measures.

Unit Guidance: Total amount of £ spent with the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with organisations in your supply chain within the specified sub-localities on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each, as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with organisations in your local supply chain within the specified sub-localities (LIST NT18a) on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services procured from each, and the first half of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect a higher need due to e.g. high deprivation and this should be captured through prioritisation at procurement and through a separate indicator at measurement. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT18a, NT19a, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with MSME suppliers that are based within the local area. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the contract's supply chain. Should not be double counted with NT14, NT18, NT18a and NT19a. Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees).

Unit Guidance: Total amount of £ spent with MSMEs (0-249 employees) in the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of £ to be spent with organisations in your supply chain within the specified local area for this contract. Specify the name of each eligible supplier, including the category (MSME)/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of £ spent with organisations in your local supply chain. Specify the name of each eligible supplier, specifying that it is a Micro, Small or Medium Enterprise, and include the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect the specificity of spending with MSMEs. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: £

Valuation

Proxy: £0.75

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £0.75 (100%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT18, NT18a, NT19, as well as with NT1b, NT1c

Reporting

Local Economic Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. This should be calculated as the cumulative spend with suppliers that are based within the local area and are Micro or Small enterprises. **A local multiplier figure for the Construction Industry and the Birmingham NUTS 3 area has been provided in the National TOMs.** This figure should be tailored to the locality and industry for the project. Alternative methodologies include the LM3 methodology - where a local multiplier should still be computed for the relevant geographical area and based on the project's supply chain. Should not be double counted with NT14, NT18, NT18a, and NT19. Micro (0-9 employees), Small (10-49 employees).

Unit Guidance: Total amount of £ spent with Micro and Small Enterprises (0-49 employees) in the supply chain within the defined local area for the project.

Target Guidance: Provide a breakdown of pounds to be spent with Micro and Small organisations in your supply chain within the specified local area on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services to be procured from each as well as the first three digits of their postcode.

Evidence Requirements: Provide a breakdown of pounds spent with Micro and Small organisations in your supply chain within the local area specified on this contract. Specify the name of each eligible supplier, specifying that is a Micro or Small Enterprise, and include the category/industry of goods/services procured from each and the first three digits of their postcode.

Technical Proxy Rationale: Please note that the proxy does not reflect the specificity of spending with Micro and Small enterprises. Economic value to the local area - increased business opportunities for the local tier 1 contractors, and their local supply chain. Based on GVA Type I Multiplier. The multiplier should be made industry specific by selecting the appropriate Industry Type I Multiplier and localised by referencing the relevant geographical GVA figures (<https://www.ons.gov.uk/economy/grossvalueaddedgva> - contact the Social Value Portal for guidance). The default assumption for leakage is 20%. An assessment of deadweight should be made on a project specific base to identify the % increase in local spend with respect to the business as usual scenario. This component of value should not be reported as Social Value, but separately as Local Economic Value, unless a specific comparison with the business as usual scenario is made.

IOOI Rating: Outcome



Measurement

Unit: No. opportunities

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Please note that MSMEs are defined as (0-250 employees) - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees).

Target Guidance: Specify the number of relevant opportunities on the contract that you are planning to create, their relevance to de-carbonisation and how you are planning to target MSMEs specifically.

Evidence Requirements: List opportunities, relevance to de-carbonisation and winning MSME.

IOOI Rating: Outcome



Measurement

Unit: No. employees provided access

Valuation

Proxy: £131.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £131.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: Total number of direct or supply chain employees on contract provided with access to comprehensive and multidimensional workplace wellbeing programmes. Qualifying programmes should include the following dimensions, be well managed and employee benefits focussed, and be easily accessible and engaging to employees: flexible working time arrangements; healthy nutrition options; physical health programmes; a health risk appraisal questionnaire; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues). If offered digitally, e.g. to cater to those employees working from home, programmes should reflect potentially changed needs and staff expectations around workplace wellbeing derived through continued and meaningful consultation and engagement with employees. This is to ensure offered services remain relevant and are comprehensively provided. For a discussion of good practice approaches to improve staff wellbeing, please see the "Best Practice in Promoting Employee Health and Wellbeing in the City of London" research report: <https://www.birmingham.ac.uk/Documents/research/ias/employee-health-and-wellbeing-in-the-city-of-london-final.pdf>

Unit Guidance: Number of employees on contract that have access to qualifying staff wellbeing programmes.

Target Guidance: Summarise your strategy for providing access to a comprehensive workplace wellbeing programme to all employees, including measures in place or planned. Describe how the programme you are going to deliver is going to be structured around the following dimensions: flexible working time arrangements; healthy nutrition options; physical health; health risk appraisal questionnaires; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues). If you are partnering with any specialist organisation, please provide details or a range of options.

Evidence Requirements: Please upload a description of the wellbeing programme you have delivered and the number of people on the contract that had access to that. Provide evidence for all of the following for the contract context: employment contract based flexible working time arrangements; access to healthy nutrition options and physical health programmes; if available provide information on use rate of healthy nutrition options and physical health programmes. Information on physical health programmes can include the structure of health and wellbeing support and advice; evidence on and structure of health risk appraisal questionnaire; access to health and wellbeing resources (health improvement web portal; information on use of wellness literature; availability and times of seminars and workshops focused on identified wellness issues). If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Average increase in productivity per worker on contract from a workplace wellbeing programme, during the year of delivery. Calculated as a conservative percentage of the assessed increased productivity resulting from reduced absenteeism and presenteeism due to ill health within a sample programme. Measures in the assessed wellbeing programme include: flexible working time arrangements; healthy nutrition options; physical health programmes including personalised health and wellbeing information and advice; a health risk appraisal questionnaire; access to a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues. (Knapp, M., McDaid, D. and Parsonage, M., 2011. Mental health promotion and mental illness prevention: The economic case.; Mills, P.R., Kessler, R.C., Cooper, J. and Sullivan, S., 2007. Impact of a health promotion program on employee health risks and work productivity. American Journal of Health Promotion, 22(1), pp.45-53.) Please note the proxy has been modelled for a large enterprise, and it might underestimate the costs of delivering the programme for smaller businesses.

IOOI Rating: Outcome



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: These are campaigns run on contract to remove stigma and promote mental health on the contract. Campaigns are to be provided for direct staff and supply chain staff. The cumulative cash value should be recorded for organising and running such campaigns.

Unit Guidance: Costs incurred (£) - costs of putting on the event(s) including hiring of spaces, stands and staff time (to be valued at 16.09 £ per staff hour).

Target Guidance: Specify the planned costs (£) to deliver the mental health campaigns on the contract (including the number of staff hours valued at £16.09 per hour, i.e., the general value for volunteering (NT17)). Describe the type and focus of the initiatives and information on who they will be targeted at (e.g. own staff or supply chain). Provide details of any organisations you intend to partner with to deliver the initiatives.

Evidence Requirements: Provide a breakdown of costs (£) to deliver each mental health campaign, and a summary of the number of people you have engaged where relevant. If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Input value - this proxy measures the value of resources (e.g., costs of putting on the events including hiring of spaces, stands and staff time) invested in Mental Health Campaigns for staff and supply chain staff on the contract.

IOOI Rating: Input/Outcome



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £101.86

Value for the Individual: £101.86 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: This includes training provided to own staff, Tier 1 supply chain and subcontractors specifically around equality, diversity and inclusion. Record the cumulative number of hours experienced by the attendees and specify both separately as a description. Only training provided for supply chain organisation at no cost to them should be included. Should not be double counted with NT20.

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 unemployed people would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Describe your strategy for delivering equality, diversity and inclusion training to own staff and supply chain on this contract. Provide a workplan, including number of staff hours that will be spent and the number of people that will be involved in the training both from your own organisations and from those in the supply chain. Explain the objectives of the training session(s) and how progress towards these objectives will be monitored over the course of the contract.

Evidence Requirements: Provide a breakdown of staff hours spent providing equality, diversity and inclusion training to own staff and supply chain organisations on this contract, including the number of people involved in the training. Describe the objectives of the training session(s) and how progress towards these objectives will be monitored over the course of the contract. Information provided should be made compliant with General Data Protection Regulations (GDPR). If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: The proxy reflects the average estimated cost of training if delivered by an external consultant. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £87.92

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £87.92 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is the number of hours dedicated to individual or group pro-bono responsible budgeting support for employees through a registered debt management provider (e.g. running internal programmes). Only training provided to staff at no cost to them should be included. This Measure requires support to be targeted and focussed on the participating individuals. Group sessions should therefore be of a size that allows for individuals to be supported based on their specific needs.

Unit Guidance: This is the number of hours providing responsible budgeting support to staff. For example, a 2-hour session attended by 8 employees would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Summarise your strategy for providing pro-bono responsible budgeting support to employees. Provide the name(s) of the registered debt management provider(s) you will partner with. Describe the number of hours to be spent in total and in partnership with each provider.

Evidence Requirements: Provide a breakdown of the pro-bono responsible budgeting support offered to employees. Provide the name(s) of the registered debt management provider(s) you partnered with. Describe the number of hours spent in total and in partnership with each provider. Information provided should be compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic value to the individual. Based on a 2021 sample of 200 pricing points from companies offering financial training, either in one-to-one sessions or daily or half-day courses in small groups. Price reductions from 2020 reflect a shift to digital service provision. While the price is reduced a case can be made for higher need for this Measure – which can be incorporated at procurement though applying a prioritisation coefficient.

IOOI Rating: Output



Measurement

Unit: No. employees provided access

Valuation

Proxy: £427.57

Value for the Individual: (0%)

Value for the Government: £48.41 (11.32%)

Value for the Community: £379.16 (88.68%)

Reporting

Social Value

Technical Guidance

Definition: Total number of direct or supply chain employees on the construction contract having been screened through a mental health survey. The survey has to be geared towards assessing risks of depression and anxiety among the workforce. Those employees identified as suffering from or at risk of depression and/or anxiety and interested in treatment have to be provided with access to a minimum of 6 sessions of Cognitive Behavioural Therapy (CBT) to address their mental health problems.

Unit Guidance: Number of employees on contract that have been screened through mental health screening and that also have access to CBT treatment if their screening identifies anxiety or depression issues.

Target Guidance: Summarise your strategy for providing access to mental health screening questionnaires for all employees on the contract and providing access to a minimum of 6 CBT sessions for all those employees that have been identified within the questionnaire as having depression or anxiety issues. If you are partnering with any specialist organisation, please provide details or a range of options.

Evidence Requirements: Provide evidence for mental health screening and availability of CBT sessions for own and sub-contractor employees on contract. This can include example mental health questionnaire; evidence for CBT service provision. If you are partnering with any specialist organisation, please provide details. requirements (GDPR).

Technical Proxy Rationale: Average annualized per person economic benefit from providing access to mental health screening and Cognitive Behavioural Therapy (CBT) for workers on contract - calculation based on per person fiscal savings to the NHS and local authority, and additional earnings for employees suffering from depression and or anxiety that are in treatment; benefit is averaged out for the entire workforce. Workplace-based enhanced depression care consists of completion by employees of a screening questionnaire, followed by care management for those found to be suffering from, or at risk of developing, depression and/or anxiety disorders. Those identified as being at risk of depression or anxiety disorders are offered a course of CBT delivered in six sessions over 12 weeks. This intervention has been shown in a number of studies to be effective in tackling depression and reducing productivity losses in various workplaces. The proxy value for RE59 being different than that for NT55 is a result of a higher suicide rate in the construction industry (Knapp, M., McDaid, D. and Parsonage, M., 2011. Mental health promotion and mental illness prevention: The economic case.; Unit Cost Database, 2019, Health Tab, HE11 measure).

IOOI Rating: Outcome



Measurement

Unit: % median gender pay gap

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This is the median pay gap at corporate level in hourly rates for men and women for the full workforce. It includes both full-time and part-time workers. It is calculated as the difference between median hourly earnings (excluding overtime) of men and women as a proportion of median hourly earnings (excluding overtime) of men, (*100). The gender pay gap is not to be confused with equal pay, which refers to the legal requirement that men and women must be paid the same amount for similar work. Guidance on calculations can be found here: <https://www.gov.uk/guidance/gender-pay-gap-reporting-make-your-calculations>. Please note that small and medium enterprises are defined as having between 50 and 249 employees. Please note that the median gender pay gap loses accuracy the smaller the company.

Unit Guidance: Guidance on calculations can be found here: <https://www.gov.uk/guidance/gender-pay-gap-reporting-make-your-calculations>.

Target Guidance: Guidance on calculations can be found here: <https://www.gov.uk/guidance/gender-pay-gap-reporting-make-your-calculations#hourly-pay-figures-you-must-calculate>. Median gender pay gap in hourly pay can be calculated by following these steps:

1. Arrange the hourly pay rates of all male full-pay relevant employees from highest to lowest;
2. Take the hourly pay rate of the middle-ranked man – this gives you the median hourly rate of pay for men;
3. Arrange the hourly pay rates of all female full-pay relevant employees from highest to lowest;
4. Take the hourly pay rate of the middle-ranked woman – this gives you the median hourly rate of pay for women;
5. Subtract the median hourly pay rate for women from the median hourly pay rate for men;
6. Divide the result by the median hourly pay rate for men;
7. Multiply the result by 100 – this gives you the median gender pay gap in hourly pay as a percentage of mens' pay.

Evidence Requirements: Provide evidence of your calculations from payroll data and, if you have done so, a narrative identifying the challenges and possible causes of the gender pay gap within your organisation, together with your ideas on how to address them. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: Guidance on practices that reduce the gender pay gap: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/731288/Gender-Pay-Gap-actions_.pdf.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Please describe initiatives and how you plan to implement them. You can include e.g. changes to recruitment and promotion practices, relevant networking and mentoring programmes, flexibility and shared parental leave policies, and specific training for staff (for examples of relevant practices see https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/731288/Gender-Pay-Gap-actions_.pdf). Please provide a description of initiatives to be delivered on the contract and a breakdown of projected costs for each. If you are partnering with any specialist organisation, please provide details.

Evidence Requirements: Provide a list of initiatives included and describe their aims and reach, together with any assessment of their impact if available (quantitative or qualitative). For each initiative, provide a breakdown of the £ invested. If you are partnering with any specialist organisation, please provide details.

Technical Proxy Rationale: Input value - this proxy measures the value of resources (e.g. costs of putting on events including hiring of spaces, stands and staff time, etc.) invested in the initiatives on the contract.

IOOI Rating: Input/Output



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: The current Real Living wage for the UK as set by the Living Wage foundation is £9.50 per hour, while the London rate is £10.85 per hour (<https://www.livingwage.org.uk/>). Please apply the appropriate rate as the relevant threshold depending on the contract.

Unit Guidance: Apply relevant rates depending on location of the contract.

Target Guidance: Please specify what Real Living Wage rates you are applying (UK or London rate) to the workforce, or to what percentages of the workforce on the contract if this only partially includes the London area.

Evidence Requirements: Please provide evidence of the total number of employment contracts and the number of employment contracts where staff are paid at least Real Living wage according to the relevant local rate. For more information see: <https://www.livingwage.org.uk/>. All data should be reported in compliance with GDPR requirements.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: The current Real Living wage for the UK as set by the Living Wage foundation is £9.50 per hour, while the London rate is £10.85 per hour (<https://www.livingwage.org.uk/>). Please apply the appropriate rate as the relevant threshold depending on the contract. MSMEs (0-249 employees): Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees).

Unit Guidance: (Total numbers of suppliers on the contract paying Real Living wage at relevant rate / Total number of suppliers on the contract)* 100; to arrive at a percentage.

Target Guidance: Please specify what Real Living Wage rates you are applying (UK or London rate) and to which contractors. Please specify the total number of contractors, and the ones that will be paying Real Living Wage to all staff on the contract. Please specify how many of these you will be supporting to do so as MSMEs and how you will support them.

Evidence Requirements: Please specify what Real Living Wage rates you have been applying (UK or London rate) and to which contractors. Please specify the total number of suppliers on the contract, and the ones that have been paying the Real Living Wage to all staff on the contract. Please specify how many of these you have supported to do so are MSMEs. All data should be reported in compliance with GDPR requirements.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: No. people FTE

Valuation

Proxy: £1,420.00

Value for the Individual: £1,420.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: On a renewed contract or TUPE, or when there is a relevant benchmark for the workforce on the contract and existing pay conditions. Can be used to monitor progress towards paying Real Living wage to all staff. The current Real Living wage for the UK as set by the Living Wage foundation is £9.50 per hour, while the London rate is £10.85 per hour (<https://www.livingwage.org.uk/>). The calculations are conservatively assuming the UK value is applied. Any difference in rates due to the contract being delivered in London can be implemented at Measurement by calculating an additional multiplier for the total and applying it in the Measurement Calculator.

Unit Guidance: Number of employment contracts on the contract that have been renewed or retained and that have raised pay to Real Living Wage, as set by the Real Living wage foundation, or higher.

Target Guidance: Please provide the estimated number of FTE employment on contract that are being renewed for which you are going to increase the wage to Real Living Wage or higher (see Definition). Please specify what Real Living Wage rates are you anticipating to apply as thresholds (UK or London rate) to the workforce, or to what percentages of the workforce on the contract if this only partially includes the London area. Use of London Living wage as opposed to UK living wage can be captured at Measurement.

Evidence Requirements: Please provide evidence of the total number of renewed or retained employment contracts where you have raised the wage to Real Living wage according to the relevant local rate (<https://www.livingwage.org.uk/>), or higher. For each contract, provide a list of the previous and new salary figures. Please specify what Real Living Wage rates you are applying as a threshold (UK or London rate) to the workforce, or the percentage of the workforce on the contract each rate of Real Living wage is paid to if this only partially includes the London area. All data should be reported in compliance with GDPR requirements.

Technical Proxy Rationale: Annual economic benefit to an individual employed full time resulting from increased earnings calculated conservatively based on the UK real living wage (lower than the London living wage) as set by the Living Wage Foundation.

IOOI Rating: Output



FM43



Theme: Growth – Supporting Growth of Responsible Regional Business

Outcome: Ethical Procurement is promoted

Measure: Percentage of your procurement contracts that include commitments to ethical employment practices in the local and global supply chain, including verification that there is zero tolerance of modern slavery, child labour and other relevant requirements such as elimination of false self-employment, unfair zero hours contracts and blacklists.

Measurement

Unit: Record only

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: Percentage of contracts within the supply chain that include commitments to ethical employment practices in the local and global supply chain, including requirements to ensure the supply chains are free from slavery and that encourage effective and transparent reporting. Please refer to: <https://www.antislaverycommissioner.co.uk/media/1329/independent-anti-slavery-commissioners-strategic-plan-19-21-screen-readable.pdf>. Should not be double counted with NT23, NT35, and other relevant Measures.

Target Guidance: Specify the total number of procurement contracts on this contract and the total number of those that will include commitments to ethical employment practices. If possible and applicable, provide a copy of your ethical procurement policy and a copy of your modern slavery statement.

Evidence Requirements: Specify the total number of procurement contracts on this contract and the total number of those that include commitments to ethical employment practices. If applicable, provide a copy of your ethical procurement policy and a copy of your modern slavery statement.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: These are initiatives run by your organisations to strengthen the identification, monitoring and reduction of risks of modern slavery and unethical work practices occurring within the supply chain for the contract. Initiatives might include supply chain mapping, staff training, robust checking processes for recruitment and agency workers (e.g. right to work checks, bank account checks, address checks), engagement programmes with the supply chain to communicate expectations and requirements around modern slavery and to offer support to solve challenges, etc.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: These are initiatives you are planning to run to strengthen the identification, monitoring and reduction of risks of modern slavery occurring within the supply chain for the contract. Identify and describe planned initiatives, and for each initiative provide a breakdown of expected costs.

Evidence Requirements: Describe delivered relevant initiatives, and for each initiative provide a breakdown of the costs. Provide detail of the number of organisations in the supply chain for the contract involved.

Technical Proxy Rationale: Input value - this proxy measures the value of resources (e.g. costs of putting on events including hiring of spaces, stands and staff time, etc.) invested in the initiatives on the contract.

IOOI Rating: Input/Output



Measurement

Unit: No. audits

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: Internal and external (independent third party) comprehensive supply chain modern slavery audits delivered, including announced and unannounced direct and supply chain site audits. For more information on tackling modern slavery in supply chains see: https://www.local.gov.uk/sites/default/files/documents/LGA_Modern%20Slavery%20Transparency%20in%20supply%20chains%20statements%20-%20Aide%20Memoire_May%202018.pdf.

Unit Guidance: Number of internal/external or announced/unannounced audits.

Target Guidance: Describe the number and nature of audits planned and provide a breakdown by type.

Evidence Requirements: Please provide a list of modern slavery audits delivered, specify if external/internal and announced/unannounced. Specific frequency per site/contractor. Provide reference to results or reports for each.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: No. people FTE

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: These are people employed at corporate level with specific responsibilities on the contract to understand and manage the risks of modern slavery. Both direct qualifying employees and people employed through the supply chain can be claimed, as long as the relevant positions in the supply chain(s) are required by contractual agreements. Attribution might need to be taken into account where the person is responsible for multiple contracts.

Unit Guidance: The measurement unit can be applied to a person working full time for a year, so if you are employing people part-time, or if the duration of the contract is shorter than one year, we ask you to calculate the full time equivalent (FTE) number of employees for the year. Please note that only employees with a contract duration of at least one year or lasting the full duration of the contract (if this is shorter) can be included within this measure. While there is no fixed definition of full time employment, an FTE of 1.0 corresponds to having one person employed on a full-time basis for a period of 12 months. We define full time employment here as working at least 35 hours per week. Include both direct employment and jobs unlocked through the supply chain as a result of your procurement requirements.

Target Guidance: Identify number of people and specify modern slavery responsibilities on the contract for each.

Evidence Requirements: Please provide a list of relevant employees and their specific modern slavery related responsibilities on the contract. Please provide information on their modern slavery related qualifications.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: As per Measure's phrasing. (Such payment terms can alleviate pressures especially on MSMSs and VCSEs within the supply chain and help tackle modern slavery issues.).

Unit Guidance: (Number of invoices paid within 30 days / Number of invoices paid on the contract) * 100 to arrive at a percentage.

Target Guidance: Please specify your payment conditions on the contract and commitments on the percentage of invoices paid within 30 days.

Evidence Requirements: Please specify the total number of invoices paid on the contract and the number of invoices paid within 30 days. Please provide evidence of implemented payment terms.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: This includes quantitative requirements in terms of social value delivered, monitoring and measurement mechanism for delivery (e.g. the National Themes, Outcomes and Measures system or equivalent). Should not be double counted with NT22 and NT35.

Unit Guidance: N/A

Target Guidance: Specify the total number of procurement contracts on this contract and the number of contracts that will include commitments to deliver social value on this contract. Explain how you will monitor and measure social value delivered through the supply chain on this contract, including how you will engage with your supply chain to promote social value.

Evidence Requirements: Specify the total number of procurement contracts on this contract and the total number of contracts that include commitments to deliver social value on this contract. Explain how you have monitored and measured social value delivered through the supply chain on this contract, including how you have engaged with your supply chain to promote social value.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome



**Social Value
Portal**



Social Healthier, safer and more resilient communities



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT25, NT26, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at reducing crime (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe what type of crime/s you aim to reduce, including how and where you aim to do so. Details of any organisations you will partner with to reduce crime must be provided.

Evidence Requirements: Provide a breakdown of pounds invested in initiatives aimed at reducing crime (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe what type of crime you have aimed to reduce, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR). Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combine with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT26, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at tackling homelessness (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe how you aim to tackle homelessness, including how and where you aim to do so. Details of any organisations you will partner with to tackle homelessness must be provided.

Evidence Requirements: Provide a breakdown of pounds invested in initiatives aimed at tackling homelessness (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17), and of any organisations you have partnered with. Describe how you have worked to tackle homelessness, including how and where you have aimed to do so. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combined with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT29, NT30 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent pound value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at tackling rough sleeping (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the initiatives to support rough sleepers you are planning to deliver. Details of any organisations you will partner with to tackle rough sleeping must be provided.

Evidence Requirements: Provide a breakdown of pounds (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at tackling rough sleeping, and of any organisations you have partnered with. Describe how you have worked to tackle rough sleeping, including how and where you have aimed to do so. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input value – this proxy measures the value of resources (e.g. costs of putting on the events including hiring of spaces, stands and staff time) invested in the initiatives on the contract. It can be combined with an impact multiplier when a dedicated impact assessment and monetisation exercise has been carried out for specific initiatives.

IOOI Rating: Input / Output



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: £1.00 (100%)

Value for the Government: (0%)

Value for the Community: (0%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan to describe how the initiatives will be delivered. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be considered (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT27, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at improving health and/or wellbeing in the community (including the number of staff hours valued at £16.09 per hour, i.e. the general value for volunteering (NT17)). Describe the type of health and/or wellbeing issue(s) you will address, including how and where you aim to do so. Provide details of any organisations you intend to partner with to deliver the initiatives.

Evidence Requirements: Provide a breakdown of the amount (£) to be invested in initiatives aimed at improving health and/or wellbeing in the community (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the type of health and/or wellbeing issues you have addressed, including how and where you have done so. Provide details of your initiatives and any organisations you have partnered with. Where an additional multiplier has been added at Measurement because of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output

Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This is the percentage of catering contracts that include requirements around nutritional content to reduce obesity and lifestyle disease and outreach campaigns to engage and inform people on the benefits of healthy food and eating. For further information please see Public Health England’s Strategies for Encouraging Healthier ‘Out of Home’ Food Provision - Annexes: evidence, tools, resources, local practice examples and guidance (https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/604909/Encouraging_healthier_out_of_home_food_provision_toolkit_annexes.pdf).

Unit Guidance: (Number of catering contracts on contract that include healthy food and outreach requirements / Total number of catering contracts on the contract) * 100 to arrive at a percentage.

Target Guidance: Please provide information on the expected percentage of catering contracts on contract that will include requirements around nutritional content and outreach campaigns to engage and inform people on the benefits of healthy food and eating, with the aim of reducing obesity and lifestyle diseases. Please outline how these requirements will help reduce obesity and lifestyle diseases and how they differ from traditional catering options. Please provide information on any organisations you may partner with.

Evidence Requirements: Please provide information on the percentage of catering contracts on contract that include requirements around nutritional content and outreach campaigns to engage and inform people on the benefits of healthy food and eating, with the aim of reducing obesity and lifestyle diseases. Please outline how these requirements helped reduce obesity and lifestyle diseases and how they differ from traditional catering options. Please provide information on any organisations you partnered with.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome / Impact



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of £ value to be invested in initiatives aimed at supporting older, disabled and vulnerable people to build stronger community networks (including the number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the group(s) you will be supporting and the activities you will deliver, including how and where you will do so. Details of any organisations you will partner with must be provided.

Evidence Requirements: Provide a breakdown of £ value (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at supporting older, disabled and vulnerable people to build stronger community networks. Describe the groups you have supported and the activities you have delivered, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output



Measurement

Unit: £ value

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be a cash donation or the equivalent value of in-kind contributions - e.g. donating a van to a community organisation - that have been made for a specific community project. The focus of this Measure is a direct provision of support to specific community projects, rather than a more general support for organisations such as VCSE. Equivalent £ value should be calculated and assumptions and details about the calculation should be made explicit. Attribution might need to be taken into account where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the toolkit guidance document for worked examples on attribution. This Measure should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: £ donated (or equivalent value in £)

Target Guidance: Provide a breakdown of the pound equivalent value of donations and/or in-kind contributions that will be donated to local community projects. Describe the local community projects you will support. Provide details of any organisations you will partner with.

Evidence Requirements: Provide a breakdown of the pound equivalent value of donations and/or in-kind contributions donated to local community projects. Describe the local community projects you have supported. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with General Data Protection Regulations (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output

Measurement

Unit: No. staff volunteering hours

Valuation

Proxy: £16.09

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £16.09 (100%)

Reporting

Social Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. Volunteering is defined by the International Labour Organisation (2001) as ‘unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household’. Here staff volunteering hours should only be recorded when time has been allocated for staff to spend on formal volunteering (not for family and friends). In the case of local community projects there might not be a community organisation at the receiving end of the volunteering, but it might be an initiative set up by the company itself based on local intelligence. Time invested in organising such activities must be recorded in this category on top of the staff volunteering time itself. Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with by the employees (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: For example, if 10 staff will volunteer 3 hours each, then the total number of hours reported should be 30.

Target Guidance: Describe the volunteering activity/ activities to be delivered and the local community projects to be supported. Provide details of any organisations you will partner with. Provide a breakdown of staff volunteering hours to be delivered to local community projects. Only regular work hours and overtime hours can be counted as volunteering hours. For example, if 10 staff will volunteer 3 hours each, then the total number of hours reported should be 30.

Evidence Requirements: Describe the volunteering activity/activities you have delivered and the local community projects you have supported. Provide details of any organisations you have partnered with. Provide a breakdown of staff volunteering hours delivered to local community projects. Only regular work hours and paid overtime hours can be counted as volunteering hours. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: The proxy reflects the replacement cost for the wage of the individual volunteering activity. It is the ONS hourly value of volunteering: based on different types of volunteering being identified in survey data (Community Life Survey) and valued at the closest market equivalent wage rate from the ASHE dataset. Updated to 2020 prices. (<https://www.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/articles/changesinthevalueanddivisionofunpaidcareworkinthek/2015#valuation-of-unpaid-formal-volunteering>). Can be localised by selecting appropriate wages for the relevant geographical area.

IOOI Rating: Input



Measurement

Unit: £ invested including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Please refer to the definition of the local area specified for NT1. A Community Charter is a document designed by the community that identifies the needs and opportunities, and directs businesses that can help towards specific deliverables. This could be provided through funding of a local community coordinator or a third party to facilitate the process. Supporting a local community coordinator means agreeing to be a sponsor and sign up to the initiatives, e.g. by directing staff volunteers towards them. This Measure should not be double counted with NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT29, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent £ value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in helping the local community draw up their own Community Charter or Stakeholder Plan (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe your strategy/workplan for engaging with the local community. Provide details of any organisations you will partner with.

Evidence Requirements: Provide a breakdown of pounds invested to help the local community draw up their own Community Charter or Stakeholder Plan (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Provide a copy of the Community Charter or the Stakeholder Plan and details of any organisations you have partnered with. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input / Output



Measurement

Unit: No.

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: The Net Promoter Score is an index ranging from 1 to 100 that measures the willingness of customers to recommend a company's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with a company's product or service and the customer's loyalty to the brand. Occupier survey using NPS (or similar) to be carried out within 18 months of occupation and then on an annual basis. Organisations should develop an action plan to improve scores where appropriate. Useful links: <https://www.medallia.com/net-promoter-score/>

Unit Guidance: Provide the score.

Target Guidance: Describe your strategy and workplan for surveying occupier satisfaction.

Evidence Requirements: Provide evidence of Occupier Satisfaction Surveys undertaken. Specify the number of survey responses you have received out of the total number of occupiers. Demonstrate actions taken or new plans put in place to improve performance and to engage with occupier feedback. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress towards higher occupier satisfaction over time.

IOOI Rating: Impact



Measurement

Unit: Yes/No

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Post occupancy evaluation is designed to assess how content an occupier is with the new development. The survey should cover all aspects of occupation. For more information please see: <https://www.architecture.com/knowledge-and-resources/resources-landing-page/post-occupancy-evaluation>.

Unit Guidance: Yes / No.

Target Guidance: Describe your strategy and workplan for carrying out your Post Occupancy Evaluation.

Evidence Requirements: Provide evidence of the Post Occupancy Evaluation that you have carried out, including a copy of the Post Occupancy Evaluation Report. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: –



Social Value
Portal



Environment

Decarbonising and safeguarding
our world

Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year; Target emissions (tonnes of CO₂e) – (not reduction); Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: RE37, RE37a, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Technical Guidance

Definition: These could result, for example, from a deliberate programme aimed at changing processes or from de-carbonisation work. This category does not include transport related savings resulting from car miles saved (e.g. cycling to work or carpooling initiatives for employees - NT32) or from low emission vehicles - NT33. Reduction should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. Should not be double counted with NT32 and NT33 or RE37, Re37a, RE39 or RE39a.

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for the evidencing of the savings recorded through the main unit.

Target Guidance: Describe the programmes or initiatives that you are going to put in place to achieve the identified savings in CO₂ emissions on the contract against the specified baseline, including timeframes. These could be from de-carbonisation work (other than transport initiatives that can be measured elsewhere). Specify and evidence the baseline level of emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”). While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

[See Next Page](#) 



Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) – (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: RE37, RE37a, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Target Guidance (continued): In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Carbon reductions should be evidenced through an independent and verifiable process (e.g. Planet Mark Certification or equivalent). There is an expectation for independently assured and audited reports to be provided. Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. "(...) the economic cost of mitigating a unit cost of carbon", to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2018) and BEIS's DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact

Measurement

Unit: Yes, Net zero before or by 2030

Additional Metrics: Yes, Net zero by 2040;
Yes, Net zero by 2050

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: At corporate level this will be your existing policy, strategy and/or plan of action to achieve, evidence and monitor net zero carbon. If you have not issued one yet, but are committing to do, please provide a statement including scope and expected publication date.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction to qualify as social value measures in the TOMs. We adopt the minimum target identified by the UN, the UK Government, and the scientific community: net zero carbon by 2050 (namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 - “NZC 2050”). While the TOMs adopt this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050. These are strongly encouraged especially for sectors where this is becoming more common.

Unit Guidance: Provide relevant documents and specify the set target for reaching Net Zero Carbon.

Target Guidance: At corporate level, this will be your existing policy, strategy and/or plan of action to achieve, evidence and monitor net zero carbon for the specified date. If you have not issued one but are committing to do so, please provide a statement including scope and expected publication date. This includes outlining and explaining set targets.

Evidence Requirements: Please provide a copy of your policy, strategy, and plan with specific milestones to achieve, evidence and monitor net zero carbon for the specified date.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Technical Guidance

Definition: Monetary contributions to offset equivalent tonnes of carbon, where carbon cannot be reduced within the contract's timeframe. Explanation on why carbon emissions cannot be reduced during contract timeframe has to be provided.. For further guidance on target setting and related baselining please see the provided Target Guidance.

Unit Guidance: Contributions should be calculated based on the tonnes CO₂e and multiplied by the per tonne value of carbon adopted on the fund. CO₂e savings refer to CO₂ equivalent emissions savings.

Target Guidance: List carbon offset contributions made into own fund or funds managed by certified external providers , providing a breakdown for the different types of offsetting and an explanation of why said carbon cannot be reduced within the contract's timeframe, Please provide information on the conversion rate used (price of CO₂e applied per tonne).

Offsetting should always be a secondary option to be implemented only once reduction of emissions and direct decarbonization cannot be reasonably achieved. In practice, this 'reasonableness' requirement which is incorporated within the Evidence Requirements for those measures will always be relative to the context of the project and will be the subject of professional judgement. As for other measures within the TOMs, the expectation is that organizations will use these measures to showcase genuine progress as opposed to pushing the envelope to inflate their social value reports. Evidence collection, verification and auditing play an important role in ensuring the right process is set up to create meaningful and transparent social value reports.

Evidence Requirements: List contributions to offset carbon made on the contract into own fund or with certified external providers, providing a breakdown for the different types of offsetting and an explanation of why said carbon cannot be reduced within the contract timeframe, as specified in the Target Guidance.

Technical Proxy Rationale: Monetary contributions to offset carbon emissions. £ value should be linked to the tonnes of CO₂e being offset and the value of carbon chosen for the calculation.

IOOI Rating: Input

Measurement

Unit: Y/N - Provide relevant documents

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: See Planet Mark (<https://theplanetmark.com/certification/>), Carbon Trust (Carbon Neutral Certification, Carbon Standard - <https://www.carbontrust.com/client-services/certification/assurance-certification/>) or equivalent.

Unit Guidance: Provide relevant documents or name the certificate you planned to achieve for the current year.

Target Guidance: List certifications achieved or to be achieved for the reporting year.

Evidence Requirements: Provide achieved certifications and documentation on how these have been achieved.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37a, RE39, RE39a, RE40

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Reduction commitments can be aligned or compared with relevant industry benchmarks (e.g. REEB, RIBA Climate challenge). Reductions, baselines and target levels should be recorded in equivalent tonnes of CO₂ emissions based on standard kWh conversion factors. Reductions should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged (e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. This covers energy used during in-use. Energy savings can be evidenced through metering data or statement from Energy Manager (i.e. degree day adjusted average). For more information see: <http://www.betterbuildingspartnership.co.uk/node/130>). Should not be double counted with other CO₂e reduction measures such as NT31, RE37a, RE39, RE39a.

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of relevant emissions estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of relevant emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for an evidencing of the savings recorded through the main unit.

See Next Page

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: The number of buildings meeting the energy savings target over the total number of buildings. The energy savings target should be set in relation to the relevant benchmark or baseline specified for RE37.

Unit Guidance: (The total number of buildings that met the energy savings target / the number of buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings and the number of buildings expected to meet the energy savings target. Provide details of the target and clarify how you will reach it.

Evidence Requirements: Specify the total number of buildings and the number of buildings that met the energy savings target. Provide details of the target and clarify how you reached it.

IOOI Rating: Outcome

Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39, RE39a

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: CO₂e savings arising from embodied carbon reductions. Reduction should be measured against a pre-existing baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts). The measure therefore requires provision of additional metrics including this baseline level of emissions and a baseline year, the target level of emissions on the project (as determined by the reduction commitments), as well as the relevant net zero carbon target year (e.g. net zero carbon by 2030) as relevant at project or corporate level. Targets for reaching net zero carbon should be specified as a minimum to be in line with a net zero greenhouse gas emissions target of 2050. More ambitious targets are strongly encouraged (e.g. net zero by 2030). For further guidance on target setting and related baselining please see the Unit and Target Guidance. Embodied carbon comprises the carbon emitted during the manufacturing process and construction of the building. A carbon assessment should be carried out according to BS EN 15978:2011. For further information see: <https://www.rics.org/globalassets/rics-website/media/upholding-professional-standards/sector-standards/building-surveying/whole-life-carbon-assessment-for-the-built-environment-1st-edition-rics.pdf>.

Additional information on embodied carbon can be accessed through the ICE (Inventory of Carbon and Energy) (https://circularecology.com/embodied-carbon-footprint-database.html#.XKX_oJhKhPY) or the Government conversion factors for company reporting of greenhouse gas emissions (<https://www.gov.uk/government/collections/government-conversion-factors-for-company-reporting>).

Unit Guidance: Reductions in tonnes of CO₂e against the baseline emissions level specified in the accompanying input field. The Measure requires data inputs for additional metrics: a baseline level of emissions (the level of emission estimated in a given year for the project in the absence of reduction efforts), the year that this estimate is based on (e.g. based on emission levels in 2018), the total level of emissions on the project as determined by the reduction efforts, and the relevant emission reduction policy (e.g. net zero by 2050 or earlier). These data inputs must be provided and evidenced, as they allow for an evidencing of the savings recorded through the main unit.

See Next Page 



Measurement

Unit: Tonnes CO₂e

Additional Metrics: Baseline CO₂ emissions (Tonnes CO₂e) and baseline year, Target emissions (tonnes of CO₂e) - (not reduction), Target year for net zero carbon (e.g. NZC by 2030)

Valuation

Proxy: £70.43

Value for the Individual: (0%)

Value for the Government: £70.43 (100%)

Value for the Community: (0%)

Double Counting Alert

Please ensure no double counting has occurred between the specified Measures: NT31, RE37, RE37a, RE39, RE39a

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Target Guidance: Specify and evidence the baseline level of embodied carbon emissions used to measure savings/reductions against and the baseline year (e.g. based on 2018 emission levels), as well as the target embodied carbon emissions after savings/reductions (i.e. the level of emissions on the project resulting from your reduction efforts). Also specify relevant emissions reduction policy (e.g. net zero by 2050 or earlier). This could be a general corporate policy or a specific project policy where it exists. Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets.

The purpose of the TOMs is to report added value. In environmental terms, this means going above and beyond the minimum required, and to support initiatives that help the world to decarbonise as quickly as possible. It also means pushing for a “green normal”, rather than treating environmental outcomes as a bolt-on or an afterthought. This determines how we establish the minimum requirements for carbon reduction measures in the TOMs, which adopts the minimum targets identified by the UN, the UK Government, and the scientific community; namely that to keep global temperature rises as close to 1.5 degrees Celsius as possible, it is necessary to achieve net zero carbon emissions by 2050 (“NZC 2050”).

While the TOMs adopts this minimum target to 2050 as the baseline, it follows that “added value” in measurement terms should come from the voluntary adoption of targets that exceed minimum requirements. More ambitious targets such as net zero by 2030, embraced by over 100 local authorities across the UK, are becoming increasingly widespread and provide greater scope to mitigate Climate Change than NZC 2050.

In some cases, a more demanding emissions requirement than NZC 2050 may have been set at a localised level with legal / regulatory effect – for example through planning regulations. In which case, this should be adopted.

Evidence Requirements: Specify and evidence the pre-existing baseline level and year that have been used to measure savings/reductions and the total embodied carbon emissions generated as a result of reduction efforts, as well as the relevant emission reduction policy (e.g. net zero by 2050 or earlier). Include any relevant information on how the targeted or realised reductions relate to this emission reduction policy or net zero targets. A carbon assessment must have been carried out according to BS EN 15978: 2011. Provide a copy of this assessment.

Technical Proxy Rationale: The proxy value is based on the abatement costs, i.e. “(...) the economic cost of mitigating a unit cost of carbon”, to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2018) and BEIS’s DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>).

IOOI Rating: Outcome / Impact



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Monetary contributions to offset equivalent carbon emissions. £ value should be linked to the tonnes of CO₂e being offset and the value of carbon chosen for the calculation.

Unit Guidance: Contributions should be calculated based on the tonnes CO₂e and multiplied by the per tonne value of carbon agreed with the external fund.

Target Guidance: List contributions to offset carbon made into external fund (it could be from S106 agreements), providing a breakdown for the different types of offsetting and where relevant explanation of why said carbon cannot be reduced within the contract's timeframe and how reduction targets relate to relevant medium- to long-term net zero emissions targets. Please provide information on the conversion rate used (price of CO₂e applied per tonne).

Evidence Requirements: List contributions to offset carbon made on the contract into an external carbon offset fund, providing a breakdown for the different types of planned offsetting and where relevant explanation of why this carbon cannot be reduced within the contract's timeframe and how reduction targets relate to relevant medium- to long-term net zero emissions targets.

Technical Proxy Rationale: Monetary contributions to offset carbon emissions. £ value should be linked to the tonnes of CO₂e being offset and the value of carbon chosen for the calculation.

IOOI Rating: Output



Measurement

Unit: Miles saved

Valuation

Proxy: £0.02

Value for the Individual: (0%)

Value for the Government: £0.01 (54.01%)

Value for the Community: £0.01 (45.99%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts

Technical Guidance

Definition: These benefits are expected to be delivered as a result of transport programmes. Provide detail on different programmes including how passenger car miles have been saved, and figures that have been used as benchmarks. There is an expectation for independently assured and audited reports to be provided. Miles can be saved on contract or through direct contract related commuting / travel. Reasonable assumptions have to be made and evidenced regarding the reduction of car miles travelled. This measure can be localized if desired, which can lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Unit Guidance: Car miles (not hundreds of miles) saved against baseline, which must be provided.

Target Guidance: Provide details on the programme to be implemented to reduce passenger car miles driven, including a breakdown of the number of car miles to be saved and how the car miles will be saved. Specify the baseline to be used (i.e. car miles driven before a programme is put in place to reduce car miles driven) and full methodology of calculation. This measure can be localized if desired, which can lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Evidence Requirements: Provide details of the corporate green transport programme implemented to reduce passenger car miles driven, including a breakdown of the number of car miles saved and how they have been saved. Specify the baseline that is used (i.e. car miles driven before a programme was put in place to reduce car miles driven) and full methodology of calculation.

Technical Proxy Rationale: Carbon cost of CO₂ emissions and social cost (including health costs) of PM2.5 and NOx for emissions from road transport by cars (ref. fleet 2019). The Carbon cost is from DfT's WebTAG guidance and based on estimated abatement costs that will need to be incurred in order to meet specific emissions reduction targets ((HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS's DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>). The social cost based on DEFRA Damage Cost Approach (DCA) and monetised. Updated to 2020 prices. The value has changed from 2020 due to updates to the pollution costs published by DEFRA, providing more accurate measurement of costs occurring as a result of NOx and PM2.5 emissions.

IOOI Rating: Outcome / Impact

Measurement

Unit: Miles driven

Valuation

Proxy: £0.01

Value for the Individual: (0%)

Value for the Government: £0.01 (38.21%)

Value for the Community: £0.01 (61.79%)

Reporting

Social Value

Technical Guidance

Definition: These benefits are expected to be delivered as a result of transport programmes. Examples of evidence would be fleet reports or mileage logs. There is an expectation for independently assured and audited reports to be provided.

Unit Guidance: No. miles driven on contract on LEV as part of a specific sustainable transport programme

Target Guidance: Provide details on the programme to be implemented. When in addition to data on the miles driven additional data on the location is collected, this measure can further be localized if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localisation of this Measure.

Evidence Requirements: Fleet report and mileage log. There is an expectation for independently assured and audited reports to be provided.

Technical Proxy Rationale: CO₂, PM2.5 and NOx emissions saved by Low Emission Vehicles (LEV) (defined by emissions <75mg/km). Carbon cost of CO₂ emissions and social cost (including health costs) of PM2.5 and NOx for emissions from road transport by cars (ref. fleet 2019). The Carbon cost is from DfT's WebTAG guidance and based on estimated abatement costs that will need to be incurred in order to meet specific emissions reduction targets (HM Green Book, Central Government Guidance on Appraisal Evaluation (2020) and BEIS's DECC/HM Treasury Green Book supplementary appraisal guidance on valuing energy use and greenhouse gas (GHG) emissions: <https://www.gov.uk/government/publications/valuation-of-energy-use-and-greenhouse-gas-emissions-for-appraisal>). The social cost based on DEFRA Damage Cost Approach (DCA) and monetised. Updated to 2020 prices.

IOOI Rating: Outcome / Impact

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: These sustainable transport incentivisation schemes for employees can include but are not limited to: subsidies for use of public transport, cycle buying scheme, cycle infrastructure provision such as storage, corporate carpooling options and incentivisation, corporate bus service, etc.

Unit Guidance: Provide information to describe corporate travel scheme available to employees.

Target Guidance: Summarise the nature of your corporate travel scheme and your strategy for providing access to it. This can include but is not limited to subsidies for use of public transport, cycle buying scheme, cycle infrastructure provision such as storage, corporate carpooling options and incentivization, corporate bus service.

Evidence Requirements: Provide information on the corporate travel scheme that has been implemented. This could be proof of a public transport subsidy or cycle subsidy scheme (expenditure or corporate policy documents); proof of cycle infrastructure (e.g. storage layout); proof of employee carpooling incentivisation and/or corporate bus service (corporate documents). Report the number of staff that have benefited from the different initiatives on the scheme.

Technical Proxy Rationale: Recorded, not monetised. This indicator measures employee incentivisation to make use of sustainable transport options, as described in the Definition. (These can include but are not limited to: subsidies for use of public transport, cycle buying scheme, cycle infrastructure provision such as storage, corporate carpooling options and incentivization, corporate bus service, etc.).

IOOI Rating: –



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: % of the fleet used on contract that comply with EURO 6 emissions standards (including all sub-categories of EURO 6) or are LEV (Low Emission Vehicles such as electric or hybrid). This includes passenger cars, light commercial vehicles and heavy trucks.

Unit Guidance: (Number of EURO 6 and LEV vehicles used on contract) / Total number of vehicles used on contract) * 100 to arrive at a percentage.

Target Guidance: Provide information on the % of the fleet planned to be used directly on contract that comply with EURO 6 emissions standard or are LEV (Low Emission Vehicles such as electric or hybrid). The fleet includes passenger cars, light commercial vehicles and heavy trucks.

Evidence Requirements: Provide information on the % of the fleet used directly on contract (this excludes employee commuting) that complies with EURO 6 emissions standards or are LEV (Low Emission Vehicles such as electric and hybrid). The fleet includes passenger cars, light commercial vehicles and heavy trucks.

Technical Proxy Rationale: Record, not monetised. This indicator measures progress towards fleet modernization with the goal of reduced air pollutant emissions.

IOOI Rating: Outcome / Impact



Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Fleet emissions monitoring programme on the contract including collection of data for each vehicle used on contract. Per vehicle used it is necessary to collect data on: distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localisation of this measure.

Unit Guidance: Upload description of your data collection programme, confirming that you will collect data on each vehicle used on the contract. Per vehicle used it is necessary to collect data on: distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d).

Target Guidance: Please describe your plan for collecting data on each vehicle expected to be used on contract, including expected distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2,

EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/government/publications/assess-the-impact-of-air-quality/air-quality-appraisal-damage-cost-guidance>. Please reach out to SVP if you have further questions regarding the localization of this measure.

Evidence Requirements: Breakdown of travel data for each vehicle used directly on contract (including by contractors), including distance travelled for contract in miles, type of vehicle (passenger car, light commercial vehicle by weight category (< 1305 kg, 1305 kg - 1760kg, >1760kg), heavy truck), engine type (diesel, petrol, electric, hybrid), EURO emissions standard of vehicle (EURO 1, EURO 2, EURO 3, EURO 4, EURO 5 (if available EURO 5a, EURO 5b), EURO 6 (if available EURO 6b, EURO 6c, EURO 6d). If data on the location is collected this measure can further be localised if desired. This could lead to a substantial increase in the captured social value. For further information please see DEFRA "Air quality damage cost guidance July 2020" document which can be downloaded from this homepage: <https://www.gov.uk/guidance/air-quality-economic-analysis>. Please reach out to SVP if you have further questions regarding the localisation of this measure.

Technical Proxy Rationale: Recorded, not monetised. Data collection programme - can be monetised through a bespoke Measure, provided all data has been collected. Emissions savings are generated through the use of a modern low emissions vehicle fleet versus a baseline vehicle fleet.

IOOI Rating: –

 **Measurement**

Unit: Y/N - Provide description

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: Regulations, monitoring and evaluation policies on internal air quality specifying desired air quality impact, auditing, and verification, with the aim of monitoring and reducing negative health and productivity impacts of indoor air pollution. For further information please see BRE's Guidance document on Ensuring good indoor air quality in buildings and other relevant documents (https://www.bregroup.com/bretrust/wp-content/uploads/sites/12/2019/03/Ensuring-Good-IAQ-in-Buildings-Trust-report_compressed-2.pdf)

Unit Guidance: Provide policies and/or describe the auditing processes.

Target Guidance: Please provide copies of relevant policies, strategies and planned internal air quality regulation measures, including targets for improvements.

Evidence Requirements: Please upload policies and results from measures aimed at regulating internal air quality, including results with a focus on improvements.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: These are donations or investments attributable to the contract geared towards environmental and biodiversity conservation and towards sustainable management projects for both marine and terrestrial ecosystems.

Unit Guidance: £ invested attributable to the contract.

Target Guidance: Provide a list of donations and projects to be supported on the contract, together with anticipated impacts and an explanation of the Monitoring and Evaluation processes to be put in place.

Evidence Requirements: Provide a list of donations and projects supported on the contract, together with information on what the anticipated impacts were and an explanation of the Monitoring and Evaluation processes that were put in place for each programme.

Technical Proxy Rationale: Input value – record investments. Can be combined with an independently calculated impact multiplier if a dedicated impact assessment has been carried out.

IOOI Rating: Input

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: These are donations or investments attributable to the contract. Reforestation or afforestation initiatives must be designed by experts to take into account, among other aspects, placement on different types of land, alternative use, climate change effects, biodiversity implications, etc.

Unit Guidance: £ invested attributable to the contract

Target Guidance: Provide a list of donations and projects to be supported on the contract, together with anticipated impacts and an explanation of the monitoring and evaluation processes to be put in place. Specify a list of areas expected to be impacted by the reforestation or afforestation projects.

Evidence Requirements: Provide a list of donations and projects supported on the contract, together with information on what the anticipated impacts were and an explanation of the monitoring and evaluation processes that were put in place for each programme. Specify or list areas that were directly impacted by the reforestation or afforestation projects.

Technical Proxy Rationale: Input value – record investments. Can be combined with an independently calculated impact multiplier if a dedicated impact assessment has been carried out.

IOOI Rating: Input



Measurement

Unit: £ (Calculated Natural Capital Benefits)

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Biodiversity loss offset or mitigation initiatives' benefits calculated through an independent Natural Capital assessment. See https://capitalscoalition.org/capitals-approach/natural-capital-protocol/?fwp_filter_tabs=guide_supplement.

Unit Guidance: Total calculated Natural Capital benefits in £.

Target Guidance: Expected Natural Capital benefits to be monetised through independent analysis.

Evidence Requirements: Provide a full study containing the natural capital benefits analysis. The study must be provided and assured by an independent provider. Details on the study provider must also be provided.

Technical Proxy Rationale: The proxy allows independently calculated natural capital benefits to be recorded.

IOOI Rating: Outcome / Impact



Measurement

Unit: £ invested - including staff time

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Participation and resources to be invested, including time and volunteering, in relevant environmental conservation and sustainable ecosystem management initiatives that can be attributed to the contract.

Only volunteering hours spent during work hours or paid overtime hours can be counted.

Unit Guidance: Total £ value including time, funds and in-kind contributions. Volunteering time spent in multi-stakeholder engagement initiatives and sustainable ecosystem management can be valued at £16.09 per hour.

Target Guidance: Participation and resources invested including time and volunteering that can be attributed to the contract. Only volunteering hours spent during work hours or paid overtime hours can be counted.

Evidence Requirements: For each initiative or project supported, provide a breakdown of volunteering and staff time invested, alongside other investment. Only volunteering hours spent during work hours or paid overtime hours can be counted.

Technical Proxy Rationale: Input value - record investments. Volunteering time spent in multi-stakeholder engagement initiatives and sustainable ecosystem management can be valued at £16.09 per hour.

IOOI Rating: Input / Output

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: % of plastic used on the contract that is recycled.

Unit Guidance: (Plastics used on the contract that are recycled (tonnes) / total plastic used on the contract (tonnes)) * 100 to arrive at a percentage.

Target Guidance: % of plastic used on the contract that is expected to be recycled.

Evidence Requirements: Provide a breakdown of the total amount of plastic used on the contract and the total amount of that that has been recycled.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: No. staff expert hours

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: This is expert staff time (e.g. financial advice / legal advice / HR advice / HSE) dedicated to supporting Voluntary Community or Social Enterprises (VCSEs) or micro, small and medium enterprises (MSMEs). Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the toolkit guidance document for worked out examples on attribution. Please note that MSMEs are defined as (0-250 employees) - Micro (0-9 employees), Small (10-49 employees), Medium (50-249 employees). The following Measures should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT27, NT28, NT29, NT30 and NT63 or other relevant Measures.

Unit Guidance: This is the number of hours staff spend providing expert advice. For example, if 5 staff spend 2 hours providing expert advice, the total number of hours reported should be 10.

Target Guidance: Summarise your strategy for providing expert advice to support VCSEs/MSMEs to adopt circular economy solutions. Provide the names of the VCSEs/MSMEs you will support or a range of options. Describe the number of staff hours to be spent in total and for each VCSE/MSME. Specify the type of expert advice that will be provided, including the type of qualification/role of the person delivering this advice.

Evidence Requirements: Provide a breakdown of staff hours spent providing expert advice to VCSEs/MSMEs. Provide the names of the VCSEs/MSMEs you have supported. Specify the number of expert staff hours spent with each VCSE/MSME, the type of expert advice given as well as the qualification/role of the person delivering this advice. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Economic benefits to VCSEs or MSMEs resulting from avoided cost of expert advice/support. Based on average self-reported fees from a survey of consultants in various sectors across the UK, updated to 2020 prices.

IOOI Rating: Output

Measurement

Unit: Kilos

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: These are benefits resulting from a plastic packaging substitution programme, and they would include either solutions that substitute plastic packaging with alternatives that have been demonstrated to be more sustainable (i.e. with an overall lower carbon footprint and not leading to collateral pollution issues) over the course of their lifecycle, or "milkman" type schemes where products are delivered in reusable packaging as opposed to single use (options are currently set to be launched in some UK markets in 2020 by different providers).

Unit Guidance: Kilos of plastic packaging use reduced.

Target Guidance: Kilos of plastic packaging to be replaced on the programme, and description of the sustainability analysis comparing the original options to the chosen alternatives. In the case of "milkman schemes", description of the scheme and intended impact.

Evidence Requirements: Report of the programme with a description of the sustainability analysis comparing the original options to the chosen alternatives. In the case of "milkman schemes", description of the scheme and intended impact.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome

Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Circular economy refers to an economic system that aims to eliminate waste through the continual use and re-use of resources. Spend on (or equivalent value of) goods and services provided by organisations through local partnerships to implement circular economy solutions.

This can include but is not limited to: ground coffee waste used for landscaping or repurposed, outdated technological equipment repurposed in local VCSEs, discarded furniture, uniforms or similar to be repurposed by local VCSEs.

Unit Guidance: The value of the goods and services planned to be requested through local partnership for a circular economy and for each detail spend or equivalent estimated value (where pro bono).

Target Guidance: Provide a list of goods and services to be requested through local partnerships for a circular economy and for each either detail the spend or the equivalent estimated value (i.e. if it is pro bono). Provide evidence on the circular economy aspect of the goods and services to be consumed.

Evidence Requirements: Provide a list of organisations you have partnered with and for each a breakdown of goods and services that were requested through local partnerships for a circular economy. For each category of items, either detail the spend or the equivalent estimated value (i.e. if it is pro bono). Provide evidence on the circular economy aspect of the goods and services consumed.

Technical Proxy Rationale: Input value - spend with local organisations on partnerships to implement circular economy solutions.

IOOI Rating: Output

Measurement

Unit: Tonnes

Valuation

Proxy: £96.70

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £96.70 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Hard to recycle waste can include, but is not limited to: cigarette butts, wrappers, cosmetic product packaging including different types of plastics. For examples of relevant programmes see Terracycle, or equivalent. (https://www.terracycle.com/en-GB/zero_waste_boxes; https://www.terracycle.com/en-GB/about-terracycle/pre_consumer_programs).

Unit Guidance: Tonnes of waste that would not be recycled through standard recycling but that have been diverted to a dedicated recycling programme.

Target Guidance: Calculate the estimated tonnes of waste that would not be recycled through standard recycling but that will be diverted to a dedicated recycling programme because of your programme or partnership. Provide information on the nature of the waste to be recycled to evidence the nature of recycling difficulties.

Evidence Requirements: Report the total amount of hard to recycle waste on the contract that has been diverted through a dedicated recycling programme. Provide details of any partner organisations on the contract for the programme. Provide information on the nature of the waste recycled to evidence the nature of recycling difficulties.

Technical Proxy Rationale: Standard Landfill rate.

IOOI Rating: Outcome

 **Measurement**

Unit: Y/N - Provide description

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: Policies on waste management specifying auditing and verification on downstream management.

Unit Guidance: Provide policies and/or describe the auditing processes.

Target Guidance: Please provide copies of relevant policies, strategies and planned downstream waste management audits.

Evidence Requirements: Please upload policies and results from downstream audits implemented on the contract.

Technical Proxy Rationale: Record not monetised.

IOOI Rating: –

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Description: Percentage of buildings meeting good practice water benchmark (e.g. REEB).

Unit Guidance: (Total buildings meeting good practice benchmark / total buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings and the number of buildings expected to meet or exceed the target benchmark. Provide details of the target benchmark and how it is expected to be reached.

Evidence Requirements: Specify the total number of buildings and the number of buildings expected to meet or exceed the benchmark. Provide details of the target benchmark and how it is expected to be reached.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of buildings meeting good practice in terms of water saved against relevant benchmark (e.g. REEB) or baseline.

IOOI Rating: Outcome



Measurement

Unit: M³

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: M³ water savings against good practice industry benchmark as set by REEB by building/asset type or RIBA Climate Challenge. The benchmark being used must be specified. For further information see: <http://www.betterbuildingspartnership.co.uk/node/130>.

Unit Guidance: M³ water saved against relevant benchmark (e.g. REEB), which must be provided.

Target Guidance: Specify the benchmark and baseline to be used. Provide a breakdown of your expected water savings and describe the measures to be implemented to achieve these. Provide both your expected total water savings and your expected water savings above the chosen benchmark.

Evidence Requirements: Provide evidence on the adopted benchmark and baseline. Provide a breakdown of your water savings and describe the measures you have implemented to achieve these. Provide both your total water savings and your water savings above the chosen benchmark. Include supporting evidence such as water statements.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the M³ water saved against a specified baseline and above a relevant benchmark (e.g. REEB).

IOOI Rating: Outcome

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Description: Percentage of buildings meeting good practice waste benchmark (e.g. REEB).

Unit Guidance: (Total buildings meeting good practice benchmark / total buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings owned or within a particular fund and the number of buildings owned or within a particular fund expected to meet the target. Provide details of the target and how it is expected to be reached.

Evidence Requirements: Specify the total number of buildings owned or within a particular fund and the number of buildings owned or within a particular fund expected to meet the target. Provide details of the target and how it has been reached.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of buildings meeting good practice in terms of waste reduced against relevant benchmark (e.g. REEB) or baseline.

IOOI Rating: Outcome



Measurement

Unit: %

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: Percent of waste diverted from landfill above a good practice industry benchmark such as BREEAM: construction waste benchmark for different waste categories diverted from landfill. BREEAM report a minimum benchmark of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only percentages of waste diverted above this figure should be counted. For further information see: BREEAM New Construction Manual 2018 - Wst01 - Construction Waste Management: https://www.breeam.com/NC2018/content/resources/output/10_pdf/a4_pdf/print/nc_uk_a4_print_mono/nc_uk_a4_print_mono.pdf.

Unit Guidance: Percentage of waste diverted from landfill over a typical benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only tonnes diverted above this should be recorded.

Target Guidance: Specify the benchmark to be used. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate what percentage of your total waste will be diverted from landfill above the chosen benchmark. Provide both your expected total waste diverted and your expected waste diverted above the benchmark. Provide a breakdown of your expected waste diverted and describe the measures to be implemented to achieve this.

Evidence Requirements: Provide evidence on the adopted benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate what percentage of your total waste has been diverted from landfill. Provide both your total waste diverted and your waste diverted above the benchmark. Provide a breakdown of the waste diverted and describe the measures you have implemented to achieve this. Include supporting evidence such as waste certificates.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of waste diverted against landfill above a relevant good practice industry benchmark.

IOOI Rating: Outcome / Impact



Measurement

Unit: Tonnes

Valuation

Proxy: £96.70

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £96.70 (100%)

Reporting

Social Value

This measure should be reported as reduction or mitigation of own negative impacts.

Technical Guidance

Definition: Tonnes waste diverted from landfill against a good practice industry benchmark such as BREEAM: construction waste benchmark for different waste categories diverted from landfill. BREEAM report a minimum benchmark of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only tonnes of waste above this figure should be reported. For further information see: BREEAM New Construction Manual 2018 - Wst01 - Construction Waste Management: https://www.breeam.com/NC2018/content/resources/output/10_pdf/a4_pdf/print/nc_uk_a4_print_mono/nc_uk_a4_print_mono.pdf.

Unit Guidance: No. of tonnes diverted from landfill over a typical benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill, so only tonnes diverted above this should be recorded.

Target Guidance: Specify the benchmark to be used. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate the tonnes of waste expected to be diverted from landfill above the chosen benchmark (Standard Rate of Landfill Tax - e.g. wood, plastics and green waste). Provide both your expected total waste diverted and your expected waste diverted above the benchmark. Provide a breakdown of your expected waste diverted and describe the measures to be implemented to achieve this.

Evidence Requirements: Provide evidence on the adopted benchmark. A typical BREEAM benchmark would see a minimum of 80% for non-demolition waste and 90% for demolition waste as diverted from landfill. Indicate the tonnes of waste diverted from landfill above the chosen benchmark (Standard Rate of Landfill Tax - e.g. wood, plastics and green waste). Provide both your total waste diverted and your waste diverted above the benchmark. Provide a breakdown of your waste diverted and describe the measures implemented to achieve this. Include supporting evidence such as waste certificates.

Technical Proxy Rationale: Standard Landfill rate.

IOOI Rating: Outcome / Impact

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: % of biocomposites and equivalent materials used as part of the project, such as for building materials. This can include supplier information.

Unit Guidance: % can be calculated as 'spend on biocomposites materials on contract' / 'total spend on materials on contract'.

Target Guidance: Summarize the planned % share of biocomposites and equivalent materials used as part of the project. This can include planned use by suppliers.

Evidence Requirements: Provide information and evidence of the % share of biocomposites and equivalent materials used as part of the project. This can include expenses, planning documents, supplier information.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: Y/N - Provide description

Valuation

Proxy: Record only

Reporting

Social Value

Technical Guidance

Definition: This is an action plan for food waste tracking and reduction on site. The plan should formulate aims and targets for management, and reduction of food waste related to site operations. For further information on food waste action plans see e.g. the Food Waste Reduction Action Plan provided by Zero Waste Scotland (<https://www.zerowastescotland.org.uk/sites/default/files/Food%20Waste%20Reduction%20Action%20Plan.pdf>) or WRAP UK's food waste reduction roadmap and related documents (<https://wrap.org.uk/food-waste-reduction-roadmap>).

Unit Guidance: Provide relevant documents.

Target Guidance: Provide information on the action plan for tracking and reducing food waste related to planned site operations. This plan should include detailed information on how food waste will be tracked and what measures will be taken to reduce the amount of food waste generated relating to site operations, including targets for reduction.

Evidence Requirements: Provide information on the action plan in place for tracking and reducing food waste related to site operations. This plan should include detailed information on how food waste is tracked and what measures are taken to reduce the amount of food waste generated relating to site operations, including a reporting of results with a focus on improvements.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: –



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Value (£) of food "waste" donated to local charities. This includes food that is beyond the due date and thereby cannot legally be re-sold as well as food that is leftover and would have been disposed of had it not been donated. The value is to be calculated based on the purchasing price of the donated food or of its ingredient's. For further information see e.g. WRAP UK's food waste reduction roadmap and related documents (<https://wrap.org.uk/food-waste-reduction-roadmap>).

Unit Guidance: Provide information on the types and quantities of the food donated, the recipients and how they benefitted. Please provide information on the £ value of the donated food based on the initial purchasing price.

Target Guidance: Please provide information on whether any food "waste" will be donated on the contract. Please provide information on the type of food that will be donated, who it will be donated to and how the recipients benefit from the food donation. If you plan to work with partner organisations please provide information on those. Please also provide information on the expected quantity (e.g. kg, litres or numbers) and the £ value of the donated food based on the initial purchasing price.

Evidence Requirements: Please provide information on whether any food "waste" has been donated on the contract. Please provide information on the type of food that has been donated, who it has been donated to and how the recipients benefited from the food donation. If you worked with partner organisations please provide information on those. Please also provide information on the delivered quantity (e.g. kg, litres or numbers) and the £ value of the donated food based on the initial purchasing price.

Technical Proxy Rationale: £ value of sum of donated food based on initial purchasing price of food, its ingredients, or ready meals.

IOOI Rating: Input / Output



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: Spend on furniture procured on the contract which is refurbished instead of new. Please also report the total % of furniture procured on the contract that is refurbished instead of new.

Unit Guidance: Total price of refurbished furniture used on contract.

Target Guidance: Please provide information on the expected types and price of refurbished furniture to be procured as part of the contract, including the expected percentage of all procured furniture that is recycled. Please provide information on the source of the to be procured furniture and evidence for the furniture having been refurbished. Please provide evidence for the price of the to be procured furniture.

Evidence Requirements: Please provide information on the types and price of refurbished furniture procured as part of the contract, including the percentage of all procured furniture that is recycled. Please provide information on the source of the procured furniture and evidence for the furniture having been refurbished. Please provide evidence for the price of the procured furniture.

Technical Proxy Rationale: Input value – spend with local organisations on partnerships to implement circular economy solutions.

IOOI Rating: Input / Output



Measurement

Unit: £

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Definition: This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for organising and running such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. Staff volunteering time should be valued at £16.09 (2020 prices) per hour, as per 2017 ONS guidance. A detailed description of the relevant initiatives should be provided, together with a method statement and a workplan. When support is being provided as part of a wider company programme (e.g. a nationwide initiative or collaboration with a charity) attribution should be taken into account (please see the toolkit guidance document for worked out examples on attribution). This Measure should not be double counted: NT15, NT16, NT17, NT24, NT25, NT26, NT28, NT29, NT30, NT63 and NT69 or other relevant Measures.

Unit Guidance: Calculate the equivalent pound value of resources invested - including cash, equipment, use of assets (e.g. space) and staff time (staff hours should be valued at £16.09 per hour).

Target Guidance: Provide a breakdown of pounds to be invested in initiatives aimed at redesigning spaces to improve recycling practices (e.g. kitchens to minimise food waste, including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)). Describe the activities you will deliver, including how and where you will do so. Details of any organisations you will partner with must be provided.

Evidence Requirements: Provide a breakdown of pounds (including number of staff hours valued at £16.09 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at redesigning spaces to improve recycling practices (e.g. kitchens to minimise food waste). Describe the activities you have delivered, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture.

IOOI Rating: Input

Measurement

Unit: % of contracts

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: List requirements and contracts where applied.

Unit Guidance: (Total contracts including relevant commitments / total contracts) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of procurement contracts on the contract, and the total number of contracts that will include sustainable procurement commitments on the contract. Provide a copy of your sustainable procurement policy or an equivalent statement.

Evidence Requirements: Specify the total number of procurement contracts on the contract and the total number of contracts that have included sustainable procurement commitments on the contract. Provide a copy of your sustainable procurement policy or equivalent statement.

Technical Proxy Rationale: Recorded, not monetised. Indicator can be used to establish a baseline and measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: % of contracts

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: List requirements and contracts where applied.

Unit Guidance: (Total contracts including relevant commitments / total contracts) * 100 to arrive at a percentage.

Target Guidance: Specify the expected total number of contracts with the supply chain on this contract that require contractors to operate low or zero emission vehicles and the total number of contracts with the supply chain on this contract.

Evidence Requirements: Specify the total number of contracts with the supply chain on this contract that require contractors to operate low or zero emission vehicles and the total number of contracts with the supply chain on this contract. Provide evidence for the contractual requirements for contractors to operate low or zero emission vehicles as implemented in contracts.

Technical Proxy Rationale: Recorded, not monetised. Indicator should be used to measure progress over time.

IOOI Rating: Outcome

Measurement

Unit: Y/N - Provide Certification

Valuation

Proxy: Record only

Reporting

Social Value

This measure should be reported as unlocked through the supply chain only.

Technical Guidance

Definition: See Carbon Trust Standard for Supply chain or equivalent (https://www.carbontrust.com/client-services/certification/carbon-trust-standard/?kw+=carbon-certificates-Broad&gclid=EAlalQobChML_ISkqaCS5wIVhrHtCh0ChwyqEAAYASAAEgLXUvD_BwE).

Unit Guidance: Provide certification or a statement with certifications you are planning to achieve.

Target Guidance: Specify certifications you have achieved or are planning to achieve within the current year.

Evidence Requirements: Provide certifications you have achieved within the current year.

Technical Proxy Rationale: Recorded, not monetised.

IOOI Rating: Outcome



Measurement

Unit: No. hrs (total session duration)*no. attendees

Valuation

Proxy: £101.86

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £101.86 (100%)

Reporting

Social Value

Technical Guidance

Definition: For examples of relevant training and courses see SDG Academy courses (e.g. <https://sdgacademy.org/>) or the real estate sector on the Supply Chain Sustainability School (<https://www.supplychainschool.co.uk/>).

Unit Guidance: The number of hours reported should be calculated by multiplying the length of the session by the number of beneficiaries. For example, a 2-hour session attended by 8 supply chain staff would be 16 hours, regardless of if the session is delivered by 1 person or 5 people.

Target Guidance: Training programmes on climate change and decarbonisation for all staff in the supply chain - sponsored for Micro and Small enterprises or required from contractors. Provide a description of what type of training you are requiring or supporting contractors to deliver to staff. Also provide the number of people receiving the training together with the overall duration.

Evidence Requirements: Provide details and evidence of what type of training has been delivered to staff in the supply chain (for Micro and Small enterprises), including number of people receiving the training together with the overall duration. If you have used online training please provide links and references, otherwise provide references to the training partner.

Technical Proxy Rationale: Economic benefits to Micro and Small enterprises resulting from avoided cost of expert advice/support. Based on average self-reported fees from a survey of consultants in various sectors, updated to UK 2020/2021 prices.

IOOI Rating: Output

 **Measurement**

Unit: %

 **Valuation**

Proxy: Record only

 **Reporting**

Social Value

 **Technical Guidance**

Definition: BREEAM In-Use is an online, international, environmental assessment methodology for independent, third party assessment and certification of a building's operational performance. The standard enables property investors, owners, managers, and occupiers to drive sustainable improvements through operational efficiency, including how to continually manage the operation of their building effectively.

Unit Guidance: (Total buildings achieving BREEAM IN-USE / Total buildings) * 100 to arrive at a percentage.

Target Guidance: Specify the total number of buildings and the total number of buildings that will achieve BREEAM IN-USE rating. Specify which BREEAM IN-USE rating you are targeting.

Evidence Requirements: Specify the total number of buildings and the total number of buildings achieving BREEAM IN-USE rating. Specify which BREEAM IN-USE rating you have achieved and provide a copy of your BREEAM IN-USE certificate.

Technical Proxy Rationale: Recorded, not monetised. This indicator reflects the percentage of new buildings achieving BREEAM IN USE rating. It could be used for comparisons and for evaluating progress.

IOOI Rating: Outcome



**Social Value
Portal**



Innovation

Promoting social innovation



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to promote local skills and employment to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment, or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations that you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT14.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to promote and support responsible business to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT15.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to enable healthier, safer and more resilient communities to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see NT16.

IOOI Rating: Input / Output



Measurement

Unit: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Valuation

Proxy: £1.00

Value for the Individual: (0%)

Value for the Government: (0%)

Value for the Community: £1.00 (100%)

Reporting

Social Value

Technical Guidance

Description: Innovative Measures to safeguard the environment and respond to the climate emergency to be delivered on the contract.

Unit Guidance: £ invested - including staff time (volunteering valued at £16.09 per hours, expert time valued at £101.86 per hour) and materials, equipment or other resources.

Target Guidance: Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.09 per hour or at £101.86 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Evidence Requirements: Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.09 per hour), staff time expert advice (valued at £101.86), equipment or equivalent value of other assets should be provided.

Technical Proxy Rationale: Input proxy – this proxy measures the value of resources pledged to support, fund or finance existing initiatives in the community. An additional multiplier capturing the rate of investment to impact should be used whenever available in the National TOMs Calculator for Measurement. This could be e.g. an SROI study developed for the specific initiative supported. Once an appropriate additional multiplier is used the proxy will capture the value to the beneficiaries, with economic, fiscal or wellbeing components included depending on what the additional multiplier adopted is designed to capture. For the specific rationale for the volunteering rate (£16.09 per hour) see NT17; for the hourly rate for expert support provided pro bono to VCSEs and MSMEs (£101.86 per hour) see e.g. NT17.

IOOI Rating: Input / Output





**Social Value
Portal**





National Social
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Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	* Please refer to the full Measure phrasing on each measure page.
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add		
 <p>Jobs Promote Local Skills and Employment</p>	More local people in employment	NT1	✓	RE1	✓	FM1	✓	No. of local direct employees (FTE) hired or retained (for re-tendered contract) on contract	
		NT1a	✓					No. of local direct employees (FTE) (TUPE transfers) retained on contract	
		NT1b	✓	RE1a	✓	FM1a	+	No. residents (FTE) employed from listed sub-localities (direct/supply chain)	
		NT1c	✓	RE1b	✓	FM1b	+	No. of local people (FTE) on contract employed through the supply chain	
		NT2	✓	RE2	✓	FM2	✓	Percentage of local employees (FTE) on contract	
	Fair Work				RE3	✓	FM3	✓	£ invested in employer's fairs held to encourage local employment in the area
		NT74	+				FM4	✓	Union recognition agreements & collective bargaining are present and encouraged
		NT75	+						Good and fair work charters are implemented
	More opportunities for disadvantaged people	NT3	✓	RE4	✓	FM5	✓	No. of employees (FTE) hired on contract who are long term unemployed (1+ yr)	
		NT3a	+					No. of armed forces veteran employees (FTE) hired on the contract (LTU)	
		NT3b	+					No. of homeless employees (FTE) hired on the contract	
		NT3c	+					No. of mothers returning to work (FTE) hired on contract	
		NT3d	+					No. of survivors of modern slavery employees (FTE) hired on contract	
		NT4	✓	RE5	✓	FM6	✓	No. of employees (FTE) hired on the contract who are NEETs	
		NT4a	+			FM6a	+	No. of 16-25 y.o. care leavers (FTE) hired on the contract	
		NT5	✓	RE6	✓	FM7	+	No. of 18+ rehabilitating or ex-offenders (FTE) hired on the contract	
		NT5a	+					No. of 18-24 rehabilitating young offenders (FTE) hired on the contract	
		NT6	✓	RE7	✓	FM8	✓	No. of disabled employees (FTE) hired on the contract	
		NT6a	+			FM8a	+	No. of disabled armed forces veteran employees (FTE) hired on the contract	
		NT7	✓	RE8	✓	FM13	✓	No. of hours supporting unemployed people into work (24 yo+)	
Improved skills					RE57	✓	FM9	+	Percentage of women (FTE) hired on the contract
				RE58	✓	FM10	+	Percentage of employees (FTE) BAME hired on the contract	
				RE71	+	FM11	+	Specific initiatives/recruitment programmes for women run for the contract (Y/N)	
				RE72	+	FM12	+	Specific initiatives/recruitment programmes for BAME run for the contract (Y/N)	
	NT8	✓	RE9	✓	FM14	+	No. of staff hours spent on local school and college visits (inc. prep. Time)		
			RE10	✓	FM15	+	No. site visits for school children or local residents		
					FM16	+	Company and supply chain policies for CPD in place		
NT9	✓	RE11	✓	FM17	✓	No. of weeks of training opportunities on the contract - Level 2, 3 or 4+			
NT10	✓	RE12	✓	FM18	✓	No. of weeks of apprenticeships on the contract - Level 2, 3 or 4+			


Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	* Please refer to the full Measure phrasing on each measure page.	
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add			
 <p>Jobs Promote Local Skills and Employment</p>	Improved skills for disadvantaged people	NT9a	+			FM17a	✓	Weeks of training opps on contract for disadvantaged groups - Level 2, 3, or 4+		
		NT10a	+			FM18a	✓	No. of weeks of apprenticeships for disadvantaged groups - Level 2, 3 or 4+		
						FM19	+	Comprehensive training for digital skills development delivered		
	Improved skills for a low carbon transition	NT54	+				FM20	+	Hrs supporting those in traditional high carbon industries to retrain (just transition)	
		NT10b	+				FM18b	✓	No. weeks of apprenticeships on contract, low carbon economy - Level 2, 3 or 4+	
	Improved employability of young people	NT11	✓		RE13	✓	FM21	✓	No. of hours dedicated to support young people into work (16-24 yo)	
					RE14	✓	FM24	✓	£ invested in employment taster days (project related sector or industry)	
		NT12	✓		RE15	✓	FM22	✓	Weeks of meaningful work placements / pre-employment courses (students, 1-6 wks, unpaid)	
		NT13	✓		RE16	✓	FM23	+	No. of weeks of meaningful paid work placements (6+ weeks, paid)	
		NT13a	+				FM23a	+	No. of weeks of meaningful work placements that pay Real Living wage (6+ weeks)	
	Retaining jobs and skills during the COVID-19 crisis	C19-1							Percentage of directly employed staff on contract retained with pre-crisis level pay/hours	
		C19-2							Percentage of directly employed staff on contract retained with agreed temporarily reduced hours	
		C19-3							Percentage of staff on contract furloughed	
		C19-4							Percentage of supply chain staff on contract retained	
		C19-19							People hired who lost job or were unable to find work due to Covid	


Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	* Please refer to the full Measure phrasing on each measure page.
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add		
 <p>Growth Supporting Growth of Responsible Regional Business</p>	More opportunities for local MSMEs and VCSEs	NT14	✓			FM25	✓	Total amount (£) spent with VCSEs within your supply chain	
		NT15	✓	RE18	✓	FM26	✓	No. hours of expert business advice to VCSEs and MSMEs	
		NT15a	+	RE18a	✓	FM26a	+	No. hours helping VCSEs and MSMEs achieve net zero carbon by 2050 or before	
		NT16	✓	RE19	✓	FM27	+	Equipment or resources donated to VCSEs (£ equivalent value)	
		NT17	✓	RE20	✓	FM28	✓	Number of voluntary hours to support VCSEs (excl. expert advice)	
				RE21	✓	FM32	+	Meet the buyer events held to highlight local supply chain opportunities	
		NT18	✓	RE22	✓	FM29	✓	Total spent in the LOCAL supply chain through the contract	
		NT18a	✓	RE22a	✓	FM29a	+	Total amount (£) spent through the contract in specified sub-localities	
		NT19	✓	RE23	✓	FM30	✓	Total amount (£) spent through the contract with LOCAL MSMEs	
		NT19a	+			FM30a	+	Total spent with local micro and small enterprises through the supply chain	
			RE73	+	FM31	+	No. opps. for local MSMEs to respond to tenders for de-carbonisation work		
		Improving staff wellbeing and mental health	NT20	✓	RE24	✓	FM33	✓	No. employees provided access to multidimensional wellbeing programmes
	NT55		+					No. employees provided workplace screening & support for anxiety & depression	
	NT39		✓			FM34	✓	£ invested in mental health campaigns for staff	
	NT56		+					Percentage of suppliers implementing mental health core/enhanced standards	
	NT21		✓	RE25	✓	FM36	✓	Equality, diversity and inclusion training for staff & supply chain	
						FM37	+	Offering pro-bono responsible budgeting support to employees	
			RE59	✓	FM35	+	No. of employees provided with support for anxiety/depression (Construction)		
		Reducing inequalities	NT57	+			FM38	+	% median gender salary gap for prime contractor staff - SMEs
	NT40		✓			FM39	+	Number and type of initiatives put in place to reduce the gender pay gap	
	NT41		✓			FM40	✓	Percentage of staff paid at least the relevant Real Living wage (Living Wage Foundation)	
	NT42		✓			FM41	+	Percentage of contractors in the supply chain required to pay at least Real Living wage	
	NT58		+			FM42	✓	No. employees (FTE) on a renewed contract or TUPE to have a pay raise to Real living wage or higher	
		Ethical Procurement is promoted	NT22	✓	RE26	✓	FM43	✓	Percentage of procurement contracts including commitments to ethical procurement
	NT43		✓			FM44	+	Initiatives in the supply chain to identify & manage risks of modern slavery	
	NT59		+			FM45	+	No. supply chain audits to identify & manage risk of modern slavery occurring	
	NT60		+			FM46	+	No. people employed to identify & manage risk of modern slavery occurring	
	NT61		+	RE60	✓	FM47	✓	Percentage of invoices on the contract paid within 30 days	

Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	* Please refer to the full Measure phrasing on each measure page.	
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add			
 <p>Growth Supporting Growth of Responsible Regional Business</p>	Cyber security risks are reduced	NT62	+					Companies in the supply chain that achieve relevant cyber security certifications		
	Social Value embedded in the supply chain	NT23	✓	RE27	✓	FM48	✓	Percentage of supply chain contracts with social value commitments, measurement & monitoring		
	Supporting workers, SMEs and VCSEs to face the COVID-19 crisis	C19-5							Support for SMEs/VCSEs to respond to the crisis & maintain business operations	
		C19-6							Percentage of invoices on the contract paid to MSMEs and VCSEs within 30 days	
		C19-7							Policy to support staff working remotely/on furlough re. mental health/wellbeing	
		C19-8							Support for staff working remotely/on furlough re. mental health/wellbeing	
		C19-9							Do you have a policy or strategy to provide safe virtual spaces to staff?	
		C19-10							Initiatives to provide safe virtual spaces to staff (inc. cyber sec. guidance)	
		C19-11							Initiatives to support own & supply chain staff delivering essential work	
		C19-12							Support for own & supply chain staff from vulnerable groups, economically	
C19-13							Percentage of contractors engaged with to implement COVID-19 response measures			

Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	* Please refer to the full Measure phrasing on each measure page.
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add		
 <p>Social Healthier, Safer and more Resilient Communities</p>	Crime is reduced	NT24	+	RE28	+	FM49	✓	Initiatives aimed at reducing crime	
	Creating a healthier community	NT25	+	RE29	+	FM50	✓	Initiatives to be taken to tackle homelessness	
		NT63	+			FM51	+	Initiatives to support rough sleepers, inc. training for security & night staff	
		NT26	✓	RE30	✓	FM52	✓	Initiatives to engage the community in health or wellbeing initiatives	
						FM53	+	Percent of catering contracts including requirements around nutritional content	
	Vulnerable people are helped to live independently	NT27	✓	RE31	✓	FM54	✓	Initiatives to support older, disabled and vulnerable with community networks	
	More working with the Community	NT28	✓	RE32	✓	FM55	+	Donations or in-kind contributions to local community projects (£ & materials)	
		NT29	✓	RE33	✓	FM56	✓	No. of hours volunteering time provided to support local community projects	
		NT30	+	RE34	✓	FM57	+	Support local community draw up their own Community Charter/Stakeholder Plans	
	Our Occupiers are more satisfied			RE35	+	FM58	+	Occupier satisfaction score (NPS)	
				RE36	+	FM59	+	Post Occupancy Evaluation has been carried out	
	Supporting communities to deal with the COVID-19 crisis	C19-14						Strategy on best practice COVID-19 workspace social interactions for own & supply chain staff	
		C19-15						Enable staff on the contract to safely volunteer within their community (COVID-19 support)	
		C19-16						Direct support to local authorities/VCSEs to deliver services to the vulnerable (COVID-19 support)	
		C19-17						Campaign funding to increase understanding of crisis behavioural norms	
		C19-20						Redesign of spaces to address Covid related risks and impacts on staff and work	

Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	* Please refer to the full Measure phrasing on each measure page.		
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add				
 <p>Environment Decarbonising and Safeguarding our World</p>	Carbon emissions are reduced	NT31	✓			FM60	✓	Savings in CO ₂ emissions on contract achieved through de-carbonisation			
		NT44	✓			FM61	+	Policy and programme to achieve net zero carbon by 2050 or before			
		NT64	+			FM62	+	Contributions made on the contract to own carbon offset fund or external provider			
		NT45	✓			FM65	+	Carbon Certification			
						RE37	+	FM66	✓	Carbon reductions via energy efficiency measures - building operations (REEB/baseline req.)	
						RE37a	+			Carbon reductions via use of renewables - building operations (REEB/baseline req.)	
						RE38	+	FM67	+	Percentage of buildings meeting target (less energy & more energy efficient)	
						RE39	✓			Carbon savings from energy efficiency measures - on site	
						RE39a	+			Carbon savings from use of renewables - on site	
						RE40	✓	FM63	+	Embodied Carbon reductions against baseline	
					RE62	✓	FM64	+	Carbon offset fund payments against new developments		
		Air pollution is reduced	NT32	+	RE46	+	FM68	+	No. car miles saved on contract (e.g. resulting from green transport programme)		
			NT33	+	RE47	+	FM69	+	No. car miles driven using low or no emission staff vehicles		
			NT46	✓			FM70	+	Corporate travel schemes available to employees on contract		
			NT65	+	RE63	✓	FM71	+	Percentage offleet or construction vehicles on contract that are at Least Euro 6 or LEV		
			NT66	+	RE64	✓	FM72	✓	Fleet emissions monitoring programme on the contract, including data collection		
							FM73	✓	Internal air quality regulations & continuous monitoring policies are in place		
		Safeguarding the natural environment	NT67	+			FM77	+	Donations towards environmental & biodiversity conservation initiatives		
			NT47	✓			FM78	+	Donations or investments towards sustainable reforestation/afforestation		
						RE65	✓	FM74	+	Offsets/mitigation initiatives on biodiversity where restoration isn't available	
						RE48a	✓	FM75	+	Volunteering for environmental conservation & sustainable ecosystem management	
			NT68	+	RE74	+	FM76	✓	Percentage of plastic recycling on contract		
		Resource efficiency and circular economy solutions are promoted	NT69	+			FM88	+	Support internally and to supply chain to adopt Circular Economy solutions		
			NT70	+			FM89	✓	Single-use plastic packaging eliminated through reusable packaging solutions		
			NT71	+			FM90	✓	Value of local partnerships to implement circular economy solutions		
			NT72	+			FM91	✓	Hard-to-recycle waste diverted from landfill/incineration		
						RE66	✓	FM79	✓	Waste management verification policies (e.g. audit hierarchy)	
						RE42	+	FM80	+	WATER: Percentage of buildings meeting good practice benchmark (e.g. REEB)	
					RE76	+			Water efficiency policy is applied on contract		

Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	* Please refer to the full Measure phrasing on each measure page.
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add		
 <p>Environment Decarbonising and Safeguarding our World</p>	Resource efficiency and circular economy solutions are promoted			RE43	✓	FM81	+	M3 water saved against relevant benchmark (e.g. REEB)	
				RE44	+	FM82	+	WASTE: Percentage of buildings meeting good practice benchmark (e.g. REEB)	
				RE45	✓	FM83	✓	Percentage of waste diverted against relevant benchmark (e.g. BREEAM)	
				RE45a	+	FM83a	+	Tonnes of waste diverted against relevant benchmark (e.g. BREEAM)	
				RE75	+	FM84	+	Percentage of biocomposites and equivalent materials	
						FM85	+	Comprehensive action plan for tracking & reducing food waste on site	
						FM86	+	Reduction of food waste through donation of leftover food to local charities	
						FM87	+	Furniture procured on the contract which is refurbished instead of new	
						FM92	+	Initiatives to redesign spaces to improve waste management and recycling practices	
	Sustainable Procurement is promoted	NT35	✓	RE49	✓	FM93	✓	Percentage of procurement contracts that include sustainable procurement commitments	
		NT73	+			FM94	+	Percentage of supply chain contracts requiring use of low/zero emission vehicles	
		NT48	✓			FM95	+	Supply Chain Carbon Certification	
		NT49	✓			FM96	+	No. hrs of climate change/carbon reduction training for supply chain staff	
	More buildings are certified			RE50	+			Percentage of NEW buildings achieving BREEAM Rating	
				RE51	+			Percentage of assets that have undergone a climate risk assessment	
				RE52	+			Percentage of assets where sustainability risk has been reduced	
				RE53	+	FM97	+	Percentage of buildings achieving BREEAM IN-USE	
	COVID-19 environmental response	C19-18						Initiatives to support appropriate collection for discarded gloves and masks	
	COVID-19 environmental response								

Theme	Outcome	National TOMs		Real Estate		Facilities Management		Measure (Short Title)	<i>* Please refer to the full Measure phrasing on each measure page.</i>
		Ref.	✓ Core / + Add	Ref.	✓ Core / + Add	Ref.	✓ Core / + Add		
 <p>Innovation Promoting Social Innovation</p>	Social innovation to create local skills and employment	NT50	✓	RE67	✓	FM98	✓	<i>Innovative measures to promote local skills and employment</i>	
	Social innovation to create local skills and employment	NT51	✓	RE68	✓	FM99	✓	<i>Innovative measures to promote and support responsible business</i>	
	Social innovation to enable healthier safer and more resilient communities	NT52	✓	RE69	✓	FM100	✓	<i>Innovative measures to enable healthier, safer and more resilient communities</i>	
	Social innovation to safeguard the environment and respond to the climate emergency	NT53	✓	RE70	✓	FM101	✓	<i>Innovative measures to safeguard the environment</i>	

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STROUD DISTRICT COUNCIL
STRATEGY AND RESOURCES COMMITTEE

24 NOVEMBER 2021

Report Title	ECONOMIC DEVELOPMENT STRATEGY			
Purpose of Report	To consider a Draft Economic Development Strategy for the District.			
Decision(s)	The Committee RESOLVES to Approve the Draft Economic Development Strategy set out in Appendix A for a period of public consultation			
Consultation and Feedback	Consultation and discussions have taken place with members of the Strategic Leadership Team, Regeneration and Investment Board, town and parish councils, local businesses and business groups.			
Report Author	Amy Beckett, Senior Economic Development Specialist Email: Amy.Beckett@stroud.gov.uk			
Options	Option 1: to do nothing. This is not recommended as it could lead to the Council being without a clearly articulated strategy and objectives for supporting the local economy. Option 2: to agree or make amendments to the draft Strategy.			
Background Papers	None			
Appendices	Appendix A – Draft Economic Development Strategy			
Implications (further details at the end of the report)	Financial	Legal	Equality	Environmental
	Yes	No	Yes	Yes

1. INTRODUCTION / BACKGROUND

- 1.1 The Council's previous Recovery Strategy and the new Council Plan both identify developing and implementing an Economic Development Strategy as a key project for the Council to help support our market towns and those sectors most impacted by the pandemic.
- 1.2 A Draft Economic Development Strategy has therefore been prepared to establish a vision for the future and to set out in more detail what the Council will do, how we will work with our partners and what the outcomes will be. The Strategy looks forward over the next ten years and aligns with other Council plans and strategies and those of our partners. It builds upon current economic information and national and county economic policies, strategies and plans.

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2. A SUMMARY OF THE STRATEGY

2.1 The Strategy sets out a brief profile of the local economy, before identifying a series of short term and long term issues and challenges, derived from examining data on national and local trends, reviewing national and county policies, strategies and plans, and engaging with businesses and stakeholders.

2.2 Some of the key issues and challenges include:

- Recovering from the Covid-19 pandemic
- Brexit
- An ageing population
- Retaining and attracting young people
- Improving skill levels
- Meeting workspace requirements including grow on space for businesses
- Long term retail trends and falling High Street spend
- Expanding the visitor economy
- Transport and broadband infrastructure

2.3 The Strategy sets out a long term vision for a sustainable, inclusive and thriving economy for our businesses, communities and visitors. To achieve this, five economic objectives have been identified:

- *Improve skills and opportunities and reduce inequalities*
- *Reduce carbon and ecological impacts*
- *Boost our market towns and rural vitality*
- *Support advanced and connected work spaces and communities*
- *Support inward investment into the local economy*

2.4 Analysis of the local economy and a review of national and county strategies and plans, has identified a series of 6 key priority areas which drive our local economy and where the ED Strategy will be focussing efforts to deliver the Vision. These are:

- The green economy
- Retail and hospitality
- Tourism and the visitor economy
- The arts and culture
- Agriculture, agritech and rural diversification
- Manufacturing and advanced engineering

2.5 The Strategy sets out a series of high level commitments for the District Council, as exemplar, enabler and encourager, to deliver the economic objectives within these 6 priority areas. The Strategy sets out how success will be monitored and measured.

3. ENGAGEMENT AND CONSULTATION

3.1 Initial engagement with local businesses included discussions with Stroud Brewery, Smiths, Sartorius, Renishaw, Stonehouse Court Hotel, MRG Systems, Berkeley Tea

Rooms, and Inches Tea Room and the Stroud District Tourism Forum with multiple attendees.

3.2 Consultation meetings took place with a number of organisations and stakeholders including; Parish Councils, Gloucestershire County Council, GFirst LEP, Stroud Growth Hub, Stroud Chamber of Trade, the Federation of Small Businesses and Visit Gloucestershire.

3.3 Some of the issues and concerns raised during the initial engagement included:

- the need for suitable business space;
- skills requirements and loss of skills to neighbouring areas, particularly young, high skilled residents to larger towns and cities;
- improvements required to infrastructure, including digitally to support blended working patterns;
- sustainable transport improvements and travel options for the Market Towns.
- supporting smaller businesses to take up opportunities to reduce the District's carbon footprint;
- increasing inward investment and developing digital opportunities;
- supporting manufacturing and service industries to move to greener ways of working.

3.4 Following the development of a Draft Strategy document further targeted consultation took place in autumn 2021 with town councils and key businesses and business partnerships. Feedback from this stage has informed the content of the final draft document.

4. NEXT STEPS

4.1 Following consideration by Committee, it is proposed to publish the Draft Economic Development Strategy for a final period of public consultation. Responses received will be considered and an amended Strategy document brought back to a future meeting of Committee for final approval.

4.2 The ED Strategy sets out a vision, objectives and high level commitments for a ten-year period. Officers will work up these commitments into an Action Plan to identify specific deliverable projects and programmes, set against short, medium and long term timeframes, identifying the relevant delivery partners and financial resources. This Action Plan will be considered at a future meeting of Committee, provisionally March 2022, alongside any amendments to the strategy following the final consultation process.

5. IMPLICATIONS

5.1 Financial Implications

There are no direct financial implications from agreeing a draft Strategy for consultation.

At its meeting in July 2021 Strategy and Resources Committee agreed to ringfence £386k of Business Rate Pool funding towards economic development works. This money will largely be used to fund the staff resource required to deliver on the post-consultation Strategy, and the subsequent action plan.

Agenda Item 9

Where specific actions or projects require additional resources in excess of those sums already allocated, they would be the subject of a separate member decision.

Andrew Cummings, Strategic Director of Resources
Tel: 01453 754115 Email: andrew.cummings@stroud.gov.uk

5.2 Legal Implications

None directly arising from this report.

Section 1 Localism Act 2011 provides an overarching power of general competence which includes economic development of the council's area.

Legal advice and support will be provided, when appropriate, as there are specific legal powers and obligations applicable to the delivery of some of the commitments in the proposed Strategy.

One Legal
Tel: 01684 272691 Email: legal.services@onelegal.org.uk

5.3 Equality Implications

The Council's key objective of improving equality of opportunity and access to economic opportunities is set out within the Strategy. Detailed equality implications relating to the key projects and activities to be developed through the Action Plan will be assessed at that time. Equality impact assessments will be carried out for any services, projects or other schemes that have the potential to impact on communities and/or staff on the grounds of protected characteristics.

5.4 Environmental Implications

Environmental sustainability and carbon neutrality are key objectives of the Strategy and supporting the green economy is identified as a priority area for the Strategy. A number of key commitments seek to reduce the carbon and ecological impacts of our local economy.

Stroud District Council

Economic Development Strategy

2022 - 2032

DRAFT November 2021

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INTRODUCTION

Stroud District has a strong and prosperous economy and is home to world class companies and innovative, resilient and successful small business sector. Yet we face both short term and long term challenges to local economic prosperity.

The District Council's new Council Plan focuses on three distinct priorities, one of which is around supporting a thriving and resilient local economy through:

- helping our high streets and businesses to recover from the impacts of Covid-19;
- delivering key regeneration sites for local job and homes;
- promoting the district to attract investment in key infrastructure and jobs;
- providing support for local businesses to grow, keeping wealth in the district and supporting local supply chains and offering rewarding local jobs;
- adopting the Local Plan to provide the strategic planning framework for prosperity

To achieve our aims this Economic Development Strategy sets out in more detail what we will do, how we will work with our partners and what the outcomes will be. Our Strategy looks forward over the next ten years and aligns with other Council plans and strategies and those of our partners. It builds upon current economic information and national and county economic policies, strategies and plans.

Purpose

The purpose of this Strategy is therefore to:

- provide a consistent vision with clear objectives and priorities for our district's economy;
- set out how the objectives and priorities will be translated into a framework for change together with the commitments needed;
- identify our role as a leader and exemplar within the local economy as well as an enabler and encourager of the activities of our public partners and the business community; and
- establish how we will measure and evaluate outcomes.

Strategies and plans

The Strategy takes into account national, regional and county policies, strategies and plans relating to the economy. A brief summary of these key documents is set out in Appendix 1.

The Strategy has also been shaped by, and will integrate with, the District Council's other plans and strategies which are intended to have a positive impact upon the local economy. These include:

- Council Plan 2021-2026
- Stroud District 2030 Strategy and Masterplan
- Leisure and Wellbeing Strategy 2021 to 2041
- Equality, Diversity & Inclusion Policy and Equality Action Plan 2021-2025
- Stroud District Local Plan (2015 and emerging 2021)

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A brief profile of our local economy

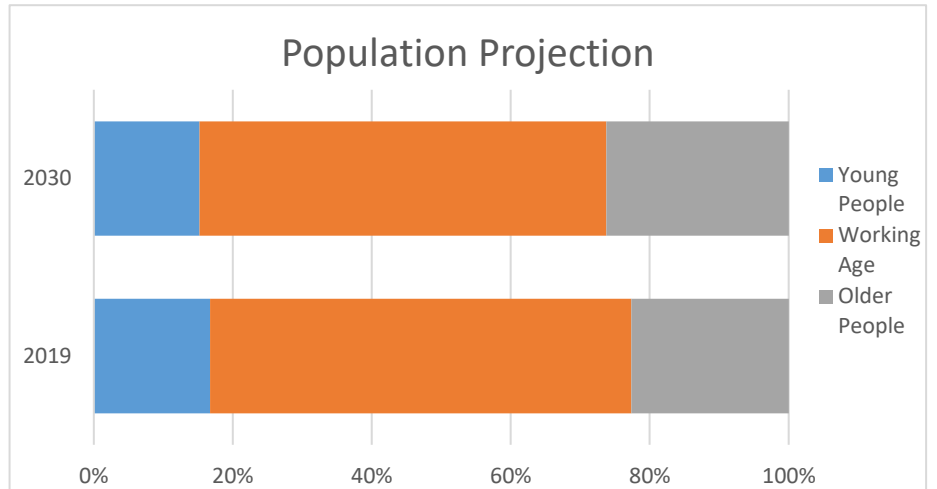
- Stroud District is home to a large number of businesses, with c.6,000 enterprises located in the area, 98.8% of which employ less than 10 employees and only 0.2% of our businesses exceeding 250 employees.
- Businesses are varied, with the largest number 18.4% classed as within the Professional, Scientific and Technical sector, 12.7% within the Construction sector, 12.7% and 8.4% within Agriculture, Forestry and Fishing.
- The sectors with the greatest employees are: Manufacturing 20%, Wholesale, Retail and Repair of Motor Vehicles 16% and Human Health and Social Work 12%. The manufacturing employment rates are well above the national average of 8%.
- Gross Value Added (GVA) is in excess of £2,890m (2016) including Manufacturing, £688m; Distribution, Transport, Accommodation and Food, £454m; and Public Administration, £433m, further evidencing how the Manufacturing sector in the district is bucking national trends and seeing growth in both employees and productivity.
- Stroud is a well-educated district, with higher qualified residents than the national average. However, within Gloucestershire, Stroud District sits within the bottom half of skills levels.
- Stroud District has the second lowest unemployment figures across Gloucestershire, with only 3.1% of the residents currently unemployed. This is significantly lower than the national average of 5% unemployment.
- Stroud Districts earnings by residence sit within the lower half of the County, at only £559.80 per week. This is however, higher than the national average. Earnings by place of work, are below the national average at £564.8 per week, rather than £586.7 per week. However, the district is the third highest across Gloucestershire.
- The working age population is projected to decrease by 2% by 2030, whilst the older population (65 years+) is due to increase by 3.6%, having a significant impact on the availability of workers and an increased need for care provision in the district.

Population:
120,000

Projected population by 2030: 128,242

Working Age Population:
71,400

51.4% qualified to NVQ4 or above
(11% more than UK average)



Qualification	Stroud District	Stroud District Percentage	GB Percentage
NVQ 4 & Above	32,500	45.4%	43.1%
NVQ 3 & Above	44,600	62.3%	61.4%
NVQ 2 & Above	55,600	77.6%	78.2%
NVQ 1 & Above	64,900	90.7%	87.9%

Weekly earnings by residence:

£559.80

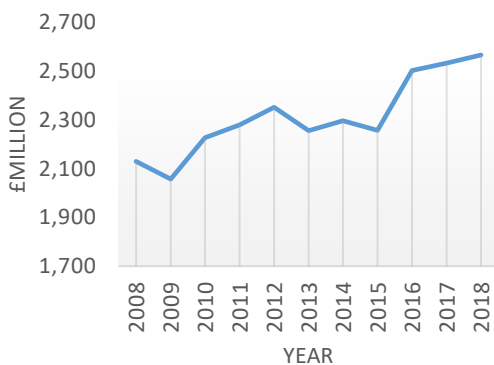
*5% less than UK av.

Weekly earnings by workplace:

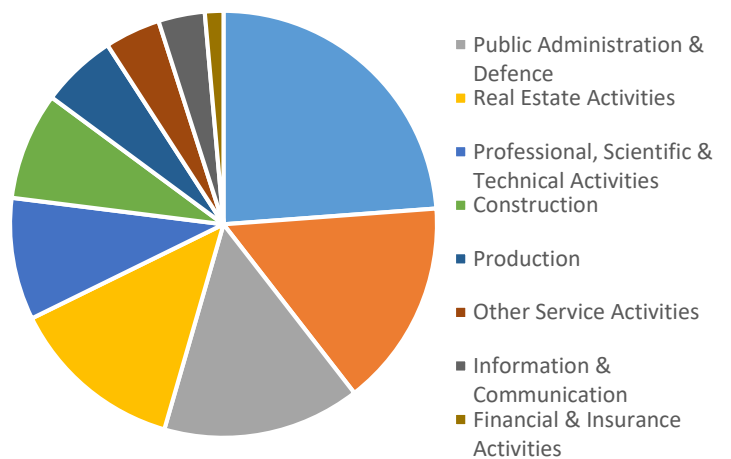
£564.80

*4% less than UK av.

**Stroud Districts
Gross Value Added
(ONS, 2018)**

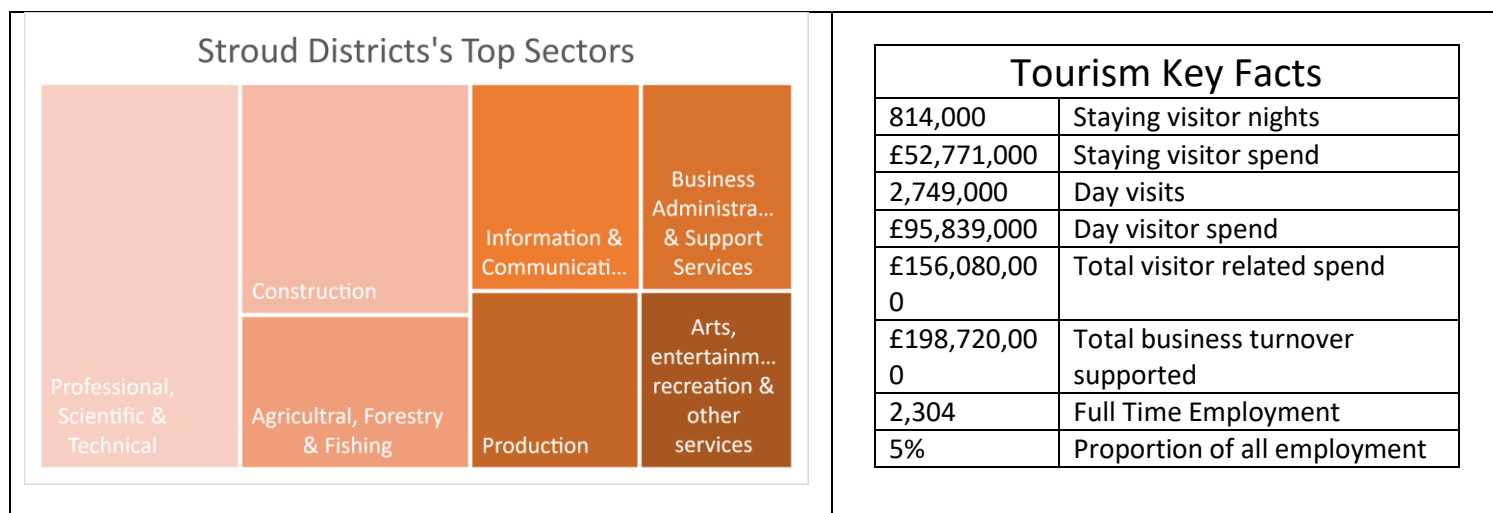


**GVA by Sector
ONS, 2016**



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Current issues and challenges

Covid-19

Stroud District, like everywhere else in the UK, has been greatly impacted by the Covid-19 pandemic. Many businesses had to close their doors to trade, with food and hospitality, tourism and High Street businesses particularly heavily impacted. At the height of the pandemic, over 9,000 employees within the district were furloughed and unemployment rose and this has led to further disparities between more affluent and poorer areas in the district.

Some impacts from the pandemic are expected to be with us permanently; changes in working patterns to a more flexible and blended approach, an increased need for reliable and fast broadband connection, and advances in the transition to online shopping. However, there may also be opportunities to translate short term change into longer term patterns of behaviours, for example an emphasis on staycations rather than foreign travel.

Brexit

The UK's departure from the European Union has resulted in impacts on the local economy. The UK Trade Info reported a 12% decline in exports to the EU in February 2021 compared with the previous year and localised data gathered by the Federation of Small Businesses shows 20% of South West businesses have temporarily halted EU sales. As well as a reduction in exports to the EU, there are also signs of shortages within the workforce and labour market. In particular, the Tourism, Agriculture, Construction and Health Care sectors are anticipated to be most impacted.

The longer term impacts of Brexit are less certain at this stage, and there may be potential opportunities from reforms to the procurement system and international market opportunities as trade agreements are signed.

Longer term issues

There are a number of longer term issues and challenges which the Stroud District economy faces. Some of these are related to the structural characteristics of the local economy and some related to population and demographic change predicted over the next ten years. A full SWOT analysis of the local economy is set out in Appendix 2.

- Our economy has existing strengths and specialisms in the manufacturing sector, especially Advanced Engineering and Manufacturing (AEM). Whilst there is

potential vulnerability if over-reliance is placed on these sectors, they offer major opportunities for strengthening Stroud District's economic role and developing a high skilled economy.

- There is a high proportion of SMEs and entrepreneurs in Stroud District, which provides an excellent opportunity for growth and innovation, but smaller businesses can also find it harder to improve productivity and future plan.
- The changing age profile of our district presents challenges, exacerbated by difficulties in retaining younger people and in attracting returners. The district's distinctive natural and built environment offers an enviable lifestyle and more could be made of this when attracting and retaining skilled workers.
- Stroud is a well-educated district, with higher qualified residents than the national average. However, within Gloucestershire, Stroud District sits within the bottom half of skills levels, and due to out-commuting and the skills drains to larger towns and cities, our businesses struggle to employ the skilled workforce they need.
- There is considerable out-commuting to work within the district, which presents a big challenge if we are to reduce our district's carbon footprint.
- There are well established commercial markets within the A38/M5 corridor, at Stonehouse, Stroud, Cam/Dursley, Berkeley/Sharpness and the Stroud Valleys where future economic needs will require further business space provision to meet the needs of specific sectors and businesses.
- There is a perceived lack of well-connected grow on space within the district. Twinned with a lack of affordable and connected commercial space sees the start-up rates of the district much lower than National rates, 10% compared to 32% over the last ten years.
- A recent reduction in occupied office space within the market towns has impacted on local spend, however there are opportunities to develop new more flexible workspace, including co-working space and to repurpose vacant units in town centres for other commercial and community uses.
- There are real opportunities for the district to take advantage of the "staycation" trend by marketing the district effectively as a tourist location. Improvements to our High Streets and visitor attractions will support Stroud becoming a year round destination and see residents accessing opportunities in their own district.
- Connectivity of public transport to hinterlands and work spaces in the district is poor, making the accessibility of some workspaces hard to access for low income residents. There are, however, opportunities to extend walking and cycling infrastructure and to design new developments to support access by public transport.
- Whilst Gloucestershire is making improvements to the broadband coverage of the district there are still areas with poor connectivity. This impacts on businesses choosing to be based in Stroud and on businesses productivity.

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*Diagram showing location of District within County
and key local employment areas, places and connections within the District*

VISION

Our ambition is to support a sustainable, inclusive, thriving and resilient economy for our businesses, communities and visitors

Stroud District has a historic commitment to social justice and to make a just transition to a low carbon economy. We need to learn how to live well without pushing our demands beyond the limit of what our planet can support. We will learn from good practice in our own district and from leaders of place across the world to build an economic success story that reflects our district's unique strengths and opportunities in order to meet the challenges we face: rising inequality, recovery from the pandemic, and the climate emergency. In partnership with our communities, and the public and private sectors, we will harness our pride of place in our market towns and rural communities, in our unique natural environment and rich industrial heritage, to build in long term resilience and prosperity. We are committed to supporting innovation, creating locally led and distinctive approaches to economic recovery and progress and ensuring the benefits of economic development are retained locally. We believe in working to reduce inequalities and making sure that access to decent job and services is fair wherever you live.

Economic objective: Improve skills and opportunities and reduce inequality

We will work with partners to seek solutions that enable all residents fair access to valued, well paid and skilled jobs in the private sector but also the district's social enterprises, community interest companies and charities, in order that local people have a good quality of life that offers equal access to economic opportunities.

Economic objective: Reduce carbon and ecological impacts

As part of our ambitions to become the greenest district in the greenest County we will support businesses in their journey to become carbon neutral, stimulating a local, green economic sector. We will work with partners on the skills gap, encouraging the district to become a place to educate and deliver the skills needed to address and adapt to climate change. We will work to ensure businesses to have a greater awareness of their carbon footprint and have the tools to transition to a low carbon economy.

Economic objective: Boost our market towns and rural vitality

The vibrancy of our Market Towns is key to our district's resilience, with a wealth of independent traders offering a unique shopping experience within our High Streets whilst our towns provide the focus for our visitor economy and a rich arts and cultural offer, including festivals, live music and theatre which was strongly positioned prior to the pandemic. We will work with our market towns to recover from the pandemic and take advantage of the latest trends in the digital economy.

We remain a predominantly rural district, with rural areas increasingly diversifying from agricultural activities into the tourism and visitor economy, including an increase in self-catering accommodation and glamping sites. The closure of community shops and pubs and rising house prices is a threat to the vitality of our smaller rural communities. The connectivity of our hinterlands to our main towns is essential to ensuring the economy's continued development is inclusive and maximises the positive impact for all communities.

Economic objective: Support advanced and connected work spaces and communities

We must ensure that we facilitate the delivery of new employment premises and enhance existing business premises in the right locations and with the right infrastructure to meet

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commercial market requirements whilst being accessible to local communities. We need to consider how we can reduce the reliance on the car and continue to make improvements to our physical infrastructure to support walking, cycling and public transport. Access to superfast broadband is now essential to working life. We need to support accelerated rollout and also improvements to 4G and 5G phone coverage.

Economic objective: Support inward investment into the local economy

Seeking to support our businesses to access private and public investment is an ongoing priority for the Council. We also need to consider ways we can market effectively the district as a desirable business location to attract the right investment. At the same time, we want to capture existing community generated wealth creation, encourage local spend and develop local supply chains to maximise the value of local assets and ensure the benefits of economic development are retained locally.

Stroud District, at its heart, is a place with a sense of pride in our rich history and a vision for a better future; an innovative and progressive local economy emerging from an industrial past, set within a breath-taking environment. We possess an independent spirit that is entwined with our community led ethos, encouraging a resilient, locally led economy, not afraid of devising new ways of thinking and doing. It is vital in our future planning that we build upon our unique qualities and strengths and take the steps necessary to make Stroud District a place to live and thrive.

Priority areas

Whilst it is important to address these economic objectives for the economy as a whole, our analysis of the local economy and our review of national and county strategies and plans, has identified a series of key priority areas which drive our local economy and where the ED Strategy will be focussing efforts to deliver the Vision.

The Green Economy

There has been a national increase over the last decade in the green sector, with a particular focus on green technologies and innovative ways for us to live and utilise energy. The UK Government currently defines green sector businesses as those involved in: low-carbon heat and energy; alternative fuels; energy efficient products; low carbon services and low emission vehicles and infrastructure.

As a local authority with the commitment to protect and enhance our natural assets, we are proactively looking to green businesses to set up locally, supporting our ambition to be the district of choice for the emerging environmental technology sector.

The District Council is currently working closely with stakeholders to ensure the sector has access to the required skillset, with ambitious work in place already, considering the needs of specialist areas within low carbon energy and energy efficient products. However, further work is required to guarantee the district prioritises this evolving sector.

However, we want to ensure all businesses play their part in transitioning to a low carbon and cleaner economy. Further to this, we want to work with all businesses and communities to create a more effective circular economy; considering different approaches to how we move people and goods around the district, the way businesses recycle, design products and consider alternative management practices. We will work with businesses in the district

across all sectors to transition to cleaner and greener ways of working; embedding positive climate change goals into their operations.

Retail and hospitality

Stroud District is home to a range of retail and hospitality businesses; both sectors are heavily reliant on visitors and as such have been greatly affected due to the pandemic as well as longer term trends towards e-retailing in all its forms: click and collect; home deliveries; and online shopping.

There are opportunities to improve the quality of retail floorspace provision within each of our main town centres in the district, although realism is required in relation to the ability for the main towns to significantly improve their respective market shares. The ongoing pattern of change suggests that for smaller retail centres such as those within our district, town centre strategies which support the evolution of the High Street are vital so we can capitalise on what makes our town centres distinctive and unique.

The UK's first national hospitality strategy was published August 2021, which outlines how to support businesses in the sector reopen and recover; with an ambitious vision to set out how the sector becomes resilient and dynamic. Businesses within this sector include cafes, restaurants, pubs, bars and nightclubs. One positive story to tell has been the rise in local food stores and food outlets, giving evidence to the trend of a newly emerging food and cafe culture. A further factor has been the growth in interest in locally sourced and organic foods and also the trend towards healthy eating.

Each of the market towns are well placed, with an array of independent retailers, public houses, restaurants and cafes, often in close proximity to tourist destinations. However, action needs to be taken to ensure the market towns thrive in the future landscape, establishing their own unique selling points and becoming destinations in their own right. Now is the opportunity to better connect communities with their market towns, enabling access to a wider variety of businesses as well as easier access for communities to services.

Tourism and the visitor economy

The tourism and the visitor economy sector made up 5% of the local economy in 2019 and was worth an estimated £112.4M GVA. However, more could be done to expand the tourism offer as the district ranks fifth out of the six Gloucestershire districts in terms of visitor numbers and third in terms of day visitors spend.

Stroud District forms part of "the Cotswolds" destination; whilst Cotswold District sees most of the tourism trade, the district has seen an increase in rural tourism including glamping and forms of farm diversification. We are committed to ensuring we take advantage of the increased interest in staycations through supporting low impact and sustainable forms of tourism.

Our market towns include a high concentration of independent retailers, with bespoke shops and galleries that offer a unique experience when visiting. Because of this the location has a competitive offer when compared to other areas across the UK. This desirable combination of businesses in our market towns adds to the experiences on offer for tourists.

When considering the ratios of visitors to the area, our hoteliers note the high numbers of corporate visitors to the district. Whilst this means there are regular overnight trips to the area, the rates corporate visitors agree to are lower than the leisure market, meaning businesses have not seen rates increase, but their overheads continue to increase year on

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year. There is a lack of accommodation and venues suitable for business events or training in the district near to transport hubs.

The Arts and Culture

Art and Culture contributed £58m to Stroud Districts GVA in 2018. A recent Arts Council and Centre for Economics and Business Research study found the sector to be highly productive with on average each FTE worker contributing £69,000 to the UK's economy.

There is a lively and diverse arts and culture scene within the district and performing space including at the Sub Rooms and Under the Edge Arts, but the sector has been impacted significantly by the pandemic. We must do everything we can to ensure venues can return; once more opening their doors to residents and visitors alike.

The arts and culture sector has wider socio-economic benefits creating a sense of community and civic pride and increasing health and wellbeing benefits. In addition, the more the sector grows, the more tourists and inward investment it will attract.

Moving forward we will look at how to support the sector's resilience and how to ensure they embrace environmental sustainability and digital technologies. We will work with community groups to offer creative opportunities to children and young people across the district, giving them the chances to grow their capacity for creativity. Working with partners we will encourage businesses to start up, increasing the jobs and accessibility of sector.

Agriculture, Agritech and Rural Diversification

Stroud District is largely a rural location, with communities living and working within a countryside setting. We are home to a variety of rural businesses. In addition to traditional farming, the district is has seen increased diversification of agricultural businesses into the visitor economy, with farms utilising space for camping, glamping and self-contained holiday lets.

Recently, there has been an increased focus on the district's agritech business base, with the sector prioritised in GFirstLEP's Local Industrial Strategy. Stroud District is well placed to see continued advances within agritech businesses; situated within close proximity to the Royal Agricultural University where higher and further education courses are available as well as short courses and knowledge transfer partnerships on offer.

Businesses and consumers are also becoming more focussed on the circular economy of food and farming, bringing positive impacts to the sector. These aspirations compliment the needs of the wider Gloucestershire area which has ambitions to be a testbed for agricultural innovation.

The sector has faced a number of recent challenges relating to the pandemic, including a surplus of harvested crops and dairy and difficulties with staffing levels and also trading and markets uncertainties relating to Brexit. There are longer term challenges ahead relating to changes to land management practices and subsidy arrangements to support increasing rural biodiversity objectives. In addition, with the increased unaffordability of house prices in rural locations and continued poor accessibility to the district's hinterlands via public transport, rural businesses face difficulty recruiting and retaining staff. This strategy looks at ways we can support this sector to become more resilient given these challenges.

Manufacturing and Advanced Engineering

Stroud District's manufacturing and advanced engineering sector continues to see year on year improvements, increasing its gross value added (GVA) and employment base. This is

despite a decline within national trends. This is due to the district being home to high end manufacturing and advanced engineering businesses that have a strong focus on research and development. Furthermore, Stroud District is well connected to the surrounding areas, such as Cheltenham and Gloucester, presenting a strong supply chain network within the county.

The districts manufacturing and advanced engineering businesses are innovative and forward thinking. Many of our businesses have been awarded Innovate UK grants, accessed national pilot schemes and supported the Country with the manufacturing of essential medical equipment during the pandemic. The strength of innovation through advanced engineering and manufacturing sector, positions Stroud District strongly to be at the forefront of low carbon technologies in particular.

Our businesses within manufacturing and advanced engineering are dispersed across the district, with clusters found around the key employment sites at Quedgeley, at Stonehouse, along the Stroud Valleys, at Berkeley and at Kingswood. With businesses in a range of specialities, including medical tech, automotive engineering and aerospace engineering, the sector is not constrained to one focus.

We recognise the strength and concentration of the manufacturing and advanced engineering within the district. We must look at ways to support their growth and development, including identifying sites and premises and the infrastructure required to support them.

Proposed commitments

Stroud District Council has an important role to play in the economy's future. As a major employer and provider of services ourselves, we must become an **exemplar**, creating a circular economy through our own procurement practices, leading on key regeneration activities and supporting our staff to develop their careers through our internal skills agenda.

Through our policies and our work in partnership with other lead organisations and businesses we can **enable** entrepreneurs to start up, promote the district as a first choice for businesses and help to align public services to the needs of our businesses; and **encourage** innovation within the local business community, supporting key stakeholders to unlock new economic opportunities.

The following table sets out a series of high level commitments which the Council will make over the ten-year period of the ED Strategy, as exemplar, as an enabler and encourager, to achieve the economic objectives set out within our Vision.

The commitments set out how the Council will intervene within each of the priority areas to deliver each of the economic objectives.

Commitment Key

The Green Economy
Retail & Hospitality
Tourism & Visitor Economy
The Arts & Culture
Agriculture, Agritech & Rural Diversification
Manufacturing & Advanced Engineering

Key Economic Objectives	Proposed Commitments		
	Be an Exemplar in our own estates and practices by	Be an Enabler as a partner and policy maker by	Be an Encourager informing and incentivising locally led action by
Improve skills and opportunities and reduce inequality	Work towards the retrofitting of all Council owned properties and working with local education training providers to develop and pilot training schemes in this specialist area.	Work in partnership with the LEP, County Council and education providers to address the skills needs of our local workforce and develop green sector specialist courses	Partner with Higher Education facilities to support businesses gain access to research and development opportunities within the green sector.
	Take on apprentices and upskill staff within the Council owned hospitality trade through our recruitment methods and HR practices	Continue to work with partners such as DWP to support residents to take up retraining and back to work opportunities within the retail and hospitality sectors.	Utilise websites focussed on careers and skills support such as the skills portal and careers hub, these sites offer support and information on next steps when considering careers change and retraining.
	The Council will allocate resources and recruit a Tourism Officer to bring skills into the district which will promote tourism across Stroud District	Work with the districts education provision, delivery partners such as DWP and tourist businesses to ensure residents have access to skills within the sector across all levels	Work with partners to disseminate information including the LEP skills portal and Growth Hub to increase skills and retention within the sector
	Develop initiatives that extend the community reach of the Councils arts and culture assets to new audiences	Work in partnership with parishes and arts and culture businesses to market the career opportunities available across the District.	Support the arts and culture businesses to encourage residents access their provision
	Develop a local food partnership that prioritises skills in circular economy and food production	We will continue to work with partners across the County who can support businesses in our rural hinterlands access a new workforce and skills	Access training on offer across the district through the promotion of college events and the LEP's skills portal

	Promote the higher skills requirements of the sector through events, job fairs and networking.	Work with education providers to increase uptake of courses that encourages innovative and prosperous ways of working for the sector and continues to see GVA increases.	Take up apprenticeship opportunities at all levels in the sector, ensuring the Districts manufacturing an advanced engineering businesses have access to their required skills
Create advanced and connected work spaces and communities	Deliver initiatives that enable Stroud District Council’s employees and visitors to use sustainable and active transport methods	Develop opportunities for businesses and residents to make improvements to their connectivity that enable greener methods of work and travel	Work with business groups to share best practices amongst local businesses, advocating carbon neutral changes to working practices.
	Create new procurement policies that enable Council owned food and beverage businesses to utilise local supply chain	Continue to highlight the needs of businesses to partners to ensure all retail and food and beverage outlets have access to reliable and fast internet connectivity, giving them the chance to utilise modern payment methods	Market best practice examples of businesses utilising net zero / carbon neutral delivery methods to customers
	Continue to progress the restoration of Cotswolds Canal, connecting communities and increase visitor spend	Work with partners to improve digital connectivity in rural locations, utilise marketing tools such as QR codes and virtual maps	Utilise effective marketing that will encourage visitors to see the District as a year round destination
	Review the Councils estate to find innovative ways to deliver fit for purpose commercial space for our arts and culture businesses	Work with partners such as the County Council and broadband providers to develop opportunities for digital arts showcases	Develop the community hubs in a way that promotes arts and culture provision, extending the reach and opportunities within the Districts

	<p>Continue to develop policies that increase the connectivity of our rural hinterlands, both physically and digitally, including the continued improvements to the canal corridor as an active commuting route</p>	<p>Work with public transport providers and the County Council to develop better access for our hinterland locations</p>	<p>Take up improved digital connectivity that will increase the reliability of the service to rural locations</p>
	<p>Prioritise the marketing of Growth Hub activities for the sector and increase the uptake of support, particularly for our small and medium business base to ensure they capitalise on opportunities currently available.</p>	<p>Plan for new business parks to meet the needs of the sector to be located in accessible areas through Local Plan policies, identifying and delivering major employment sites with key infrastructure</p>	<p>Support the sectors accessibility of a local supply chain, encouraging a circular economy and retain spend within the District, evidencing we are an innovative and a forward thinking business destination.</p>
Reduce carbon and ecological impacts	<p>Ensure Stroud District estate are working towards becoming green work places through the use of and opportunities to store green energy and retrofit buildings</p>	<p>Develop a good employer charter that encourages green working practices, positive changes to businesses ecological impact and prioritises the use of a circular economy</p>	<p>Promote good news and best practice of businesses within the district utilising green innovation to encourage other businesses in the district to consider transitioning to these</p>
	<p>Initiate a programme of sustainable measures at Council owned public parking facilities at retail centres to support modal shift to active travel and public transport</p>	<p>Enable the Districts hospitality businesses to reduce their ecological impact through increased local supply chains and improving their carbon food print and consider how they access community farms and orchards.</p>	<p>Support businesses to access food standards in environmental health and understand how they can reduce food waste</p>
	<p>The Council will change the management of our estate to</p>	<p>Create safe and accessible active travel routes from public transport</p>	<p>Take up sustainable working practices by promoting the benefits and success stories of businesses within the district</p>

	improve biodiversity and sequestration of our green spaces	hubs, creating effective last mile routes to tourism destinations	
	All Council owned arts and culture assets will become net carbon zero and seek to make biodiversity enhancements, ensuring that the promotion of sustainable ways of working is done in a positive way	Enable through working with the artistic and creative sectors to raise levels of engagement with the natural world and raise the profile of the climate and ecological emergency to have a positive impact	
	Develop procurement policy and practices to support local food production and local supply chains	Promote the funding initiatives to businesses in rural locations to make both sustainable improvements and encourage positive land use practices such as tree planting, re-wilding and natural flood management to the Districts eco-system to commercial properties	Encourage businesses in rural locations to take up funding initiatives and business support that is available through partners including growth hubs to transition to sustainable practices
	Support procurement from local businesses within the sector that can demonstrate development of low carbon goods and services	Explore agri-tech opportunities for businesses and how they can be supported to create carbon neutral farms with improved access to technology	Encourage the business base to consider modern practices that enable them to be greener through higher energy efficiency and low carbon production. We could do this through encouraging the shift to net zero practices through awards and accreditations.
Boost our market towns and rural vitality	Initiate a programme of measures at Council owned parking facilities to support modal shift to active travel and public transport and improve access to EV charging points	Continue to work with transport bodies to develop better transport links that improve services between rural areas and local town centres	Encourage businesses in the District to consider sustainable and active last mile deliver methods

	Use Council land to support the regeneration proposals that will positively impact the retail and the night time economy	Look to new ways of working within retail centres including “bank hubs” and maximise the opportunities for health hubs that bring back essential services for communities and businesses alike	Develop an online presence for the Districts retail and hospitality businesses by disseminating best practice and sharing social media campaigns
	The Council will facilitate better access to our market town centres through sustainable travel methods, including the regenerating canal corridor sites	Work in partnership with stakeholders to better promote the market towns as a tourist destination, sharing the positive experiences of visitors and creating an itinerary offer of events	Identify ways extend the season and rethink the opportunities and visitor’s needs through the creation of a micro tourism offer
	Promote a programme of arts and culture events and festivals across the district that will increase attendance and economic impacts	Facilitation of market town meetings and working with partners to understand needs through the creation of an effective network that establishes the unique needs of each area	
	The Council will employ a dedicated resource to support the market towns vitality and connection to rural hinterland, seeking to support recovery through the delivery of unique initiatives to each location	Develop and deliver Local Plan policies that will enable rural diversification	Access and spend at local food markets where the districts businesses bring produce to market and encourage visitors to engage in the town
	Investigate the opportunity for delivering start up units and shared working space for manufacturing and advanced engineering businesses, reducing their barriers to market	Work with partners, from the private and public sectors to ensure advanced engineering and manufacturing businesses are well connected and are confident working	Invest in our well connected rural locations through effective marketing of the Districts hinterlands

		from our rural locations with excellent access to business parks	
Support inward investment into the local economy	Continue to focus on how Stroud District Council develop sites and attract new, green businesses to the area	Enable businesses in the District to access private sector investment through effective marketing of the Districts assets including our sustainable transport links, digital connectivity and green skills	Encourage the creation of localised supply chains within the District to attract new businesses into the area
	Continue to deliver support for the food and farmers markets through use of the land and effective marketing	Support retail and hospitality businesses access sector specific support through key organisations such as the Growth Hub	Encourage our retail and hospitality businesses to better promote their offers with access to increased skills of effective online marketing
	Promote the Council's and districts assets through branded campaigns, both in partnership with Destination Management Organisations and as Stroud District Council	Work with neighbouring authorities and Destination Management Organisations to create and coordinate accessible tourism information	Encourage businesses to better promote themselves and increase the visibility of their businesses online including taking up support through partner and business support channels
	Continue the Canal Corridor regeneration project, seeking to encourage visitors and localised tourists to access the canal as a key area of interest and as a mode of travel	Continue to work with partners to develop effective marketing material that enable inward investment from the private sector	Take up opportunities of funding through the Department of Culture, Media and Sport and the Arts Council to deliver new programmes of work and increase the positive impacts of the sector
	Promote best practice through our local food and drink production that will support to identify the District as a preferred place to do business	Promote available Agri-tech courses at Higher and Further Education facilities to enable our businesses access development opportunities that offer improved productivity	Encourage new ways of working and attendance of exhibitions for rural business owners to alter their work practices to ways that support inward investment

	<p>Support the website offer and one stop shop approach of the Councils support to businesses with a dedicated resource for the sector and promoting the district as a location for advanced engineering</p>	<p>Work in partnership with LEP to develop funding bids for investment into local businesses and improving local infrastructure</p>	<p>Encouraging the take up of existing support networks within the sector through the support available including the Growth Hub and national support on offer</p>

What the Strategy means for places

The profile of the local economy means that economic activity and employment is not evenly distributed across the district. Sectors of the local economy have different locational requirements and reflect the availability of labour, access to key markets and key services and infrastructure. Equally the ED Strategy is focussing on key priority areas which are not evenly distributed across the district.

The District Council's Local Plan groups parishes together within the district that share some geographic and functional similarities. These eight parish clusters are used in the following table to indicate how the ED Strategy is likely to be delivered spatially across the district. It indicates the top 3 priority areas for each parish cluster based upon their current distribution. This is not to say that commitments within other priority areas will not be delivered within all parish cluster areas, but it is a broad indication of where commitments relating to the key priorities are more likely to have an impact.

	Berkeley cluster	Cam & Dursley	Cotswold cluster	Gloucester fringe	Severn Vale	Stonehouse cluster	Stroud Valleys	Wotton cluster
The Green economy	✓			✓	✓	✓	✓	
Retail and hospitality		✓	✓			✓	✓	✓
Tourism and the visitor economy	✓		✓		✓			✓
The Arts and Culture		✓					✓	✓
Agriculture, Agritech and Rural Diversification	✓		✓	✓	✓			
Manufacturing and Advanced Engineering		✓		✓		✓		

Diagram showing eight parish cluster areas

DELIVERY

Measuring success

We need to ensure that the ED Strategy delivers success for the district. If we aspire to a genuine 'green economy', in order to measure success, we therefore need to look beyond GDP and GVA. These are now being questioned as sufficient measures of success as their increases closely match the ongoing increases in CO2 emissions. We can no longer simply accept 'growth' as a measure of success alongside persisting inequality and the need to live within the finite resources of the planet. Our strategy will reflect more recent thinking on how to measure 'success' for which we can draw on some emerging tools being used by other localities.

The following table sets out the range of outcomes we believe will demonstrate the successful delivery of the ED Strategy for each of our economic objectives.

Key Economic Objectives	Proposed Outcomes
Improve skills and opportunities and reduce inequality	<ul style="list-style-type: none"> ▪ Decrease in unemployment figures ▪ Reductions of NEET figures ▪ Increase in average residential gross weekly pay ▪ Increase in number of businesses accessing Growth Hub intervention and support ▪ Reduction of LSOA areas sitting in top 3 deprived areas ▪ More Living Wage Employers ▪ Increase in trade union membership ▪ Greater number of apprentices ▪ Reduced gender pay gap
Support advanced and connected work spaces and communities	<ul style="list-style-type: none"> ▪ Percentage increase of digital connectivity ▪ Improvement in rail facilities ▪ Amount of new commercial space completed ▪ Amount of brownfield sites bought forward for re-development ▪ Increase in business start-up and closure rates ▪ Number of businesses in the district ▪ Greater diversity of business models: cooperatives, social enterprises, community interest companies
Reduce carbon and ecological impacts	<ul style="list-style-type: none"> ▪ Increase in businesses powered by clean energy ▪ Number of EV charging points ▪ Number of green tech sector businesses in the district ▪ Number of retrofitted commercial sites ▪ Increase in active travel for commuting
Boost our market towns and rural vitality	<ul style="list-style-type: none"> ▪ Decrease in Town Centre vacancy rates ▪ Increased Town Centre footfall rates ▪ Increased employment in towns ▪ Increase in community shops and pubs ▪ Increased connectivity of hinterland locations ▪ Increase of businesses within market towns and rural locations
Support inward investment into the local economy	<ul style="list-style-type: none"> ▪ Increase in number of day and overnight visitors ▪ Increase in tourist spend in the district ▪ Increase in GVA

	<ul style="list-style-type: none">▪ Increase of local businesses awarded procurement contracts▪ Higher local spend by key anchor institutions
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Developing an Action Plan

The ED Strategy sets out a vision, objectives and high level commitments for a ten-year period. We will work up these commitments into an Action Plan to identify specific deliverable projects and programmes, set against short, medium and long term timeframes, identifying the relevant delivery partners and financial resources.

The vision of the ED Strategy to support a sustainable, inclusive and thriving economy is one owned by the whole Council, with teams working in partnership to maximise the opportunities and support available for the area's businesses and communities. Consequently, the ED Strategy incorporates commitments relating to existing and proposed projects derived from other Council strategies and plans. Our priorities and objectives are cross-cutting and owned by the whole Council, and many of the projects and activities will not be solely the responsibility of one service, but a number of services.

Working in partnership

We cannot do all of this alone. Much of the ED Strategy will be delivered by partners and stakeholders. Key partners that will support us meet the needs of the local economy are wide ranging and include:

- **Public bodies** such as the County Council, neighbouring local authorities and town and parish councils have the ability to work together with Government agencies to unlock national and local funding support to deliver and facilitate positive change for local communities and the local economy.
- **Businesses** from all sectors and sizes are integral partners, working with public bodies to ensure their needs are understood and interventions are what they need to support them drive the local economy.
- **Business partnerships** including GFirstLEP, the Stroud Growth Hub, Federation of Small Businesses, Chambers of Trade and sector or area specific local partnerships have a powerful voice advocating on behalf of businesses to central and local government to ensure their needs are represented.
- **Community hubs and social enterprises** are well established, central points of contact into the community. They are places residents feels safe and are the grass roots networks across Stroud District. They provide a valuable means by which public bodies can understand the needs of our communities.

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Performance Monitoring Report: S&R Committee

DATE OF MEETING	3rd November 2021
ATTENDEES	Members: Nick Housden, Keith Pearson, Officers: Andrew Cummings, Alison Fisk, Adrian Blick, Lucy Powell, Simon Killen

PERFORMANCE UPDATE <i>(please give a brief progress update on the following areas)</i>	
CDP PRIORITIES <i>(see Excelsis)</i>	<p>CDP 1 – Continue to allocate funds from the business rates pilot fund in line with the agreed principles</p> <p>This funding will form part of the resources available for the now agreed Council Plan.</p>
	<p>CDP 1.3 – Progress and deliver the redevelopment of Brimscombe Port by securing planning permission and being ready to seek a development partner</p> <p>Vacant possession of the site was achieved on the 30th September with the Grace Network relocating to the adjacent site at Brimscombe Mills. Support for the search for a new home for RUSH is continuing.</p> <p>A demolition contractor, Haywood Crushing Demolition Ltd, has been appointed to undertake the demolition of the buildings at Brimscombe Port. This has been announced on our website and we will be updating those who signed up through the community engagement event of this appointment along with details on issues such as traffic management, car parking and asbestos.</p> <p>Demolition work began on the 25th October and is programmed to take 16 weeks. The Listed Mill building will remain and continue to be occupied by the Council's commercial tenants together with the Listed Salt House.</p> <p>The procurement process for a developer went live on Friday the 29th October.</p> <p>Regular meetings are taking place with the Parish Council, a leaflet drop will be made to residents in the next week with information about the redevelopment and giving notice of a drop-in event on the 17th November giving an opportunity to meet the project team and learn more about the redevelopment process and programme.</p>

	<p>CDP 1.4 – Submit a bid to the National Lottery Heritage Fund by April 2020 to restore the canal link between Stonehouse and Saul.</p> <p>Partial Permission to Start was granted by National Lottery Heritage Fund on 25th August 2021. However, project remains at risk until Full Permission to Grant is awarded. Key risk is submission and award of planning application for the Missing Mile. The target date for submission of the planning application is December. Aim is to get Full Permission to Start awarded by March 2022.</p> <p>New Project Director, Chris Mitford-Slade is currently conducting a detailed review of the project including Project Governance, roles and responsibilities, project costs and programme delivery. Review findings and recommendations will be presented to the CCC Project Board on 10th November 2021.</p> <p>Network Rail have recommenced the works on the Ocean Railway Bridge at Stonehouse and local residents are being kept informed of progress and work activities through letter drops and fortnightly briefings. The towpath along this section of the canal is closed until April 2022 with an alternative route published.</p>
	<p>CDP 1.6 – Create a strategic approach to building more effective partnerships with parish and town councils.</p> <p>The development of a new engagement strategy with Town and Parish Councils is included as an action within the new Council Plan and will be delivered by the Corporate Policy and Governance Team.</p>
	<p>CDP 1.7 – Adopt a clear vision and digital strategy which is fit for purpose to deliver good quality, convenient and efficient services for staff, residents and local businesses.</p> <p>Vision and strategy prepared and actions underway including procurement of a Digital Platform. Vendor selected and finalising contract prior to implementation.</p>
	<p>CDP 5.2 - Explore the opportunities for income generation to help achieve financial self-sufficiency</p> <p>The new Council Plan will include full consideration of the resourcing of Council priorities.</p>
<p>PROJECTS / CAPITAL PROGRAMME (if not covered in CDP)</p>	<p>The major capital projects for the Committee are the Canal and Brimscombe Port which are included in the actions above.</p>

RISKS
(see *Excelsis*)

CCR 1 Failure to develop a Budget Strategy 6/16
Budget Strategy was approved at Council on October 21st
Agenda Item 10a

CCR 4 Business Continuity 9/16 (was 16/16)

This risk has been lowered due to the continued investment and development of our systems. When this risk was identified the organisation did not have the use of external working systems and equipment. Following Covid and development of the new IT team this has now progressed.

CCR 10 Inability to recruit specialist staff 4/16 – (previous 16/16)

A People Strategy has been produced to set out how the Council supports and develops staff within the Organisation.
A HR Team review has built in a provision for Organisational Development where a plan for recognising and developing talent will be implemented. Along with a strategic plan for recruitment, building the Council as an employer of choice.
Principal ICT Officer started on 11th October.

CCR 16 Inadequate telephony and IT infrastructure 8/16 –

Telephony upgraded to a modern, internet-based solution.
Infrastructure upgraded including provision of network resilience.

CCR 19 Covid-19 pandemic 9/16

The pandemic is being actively managed as an ongoing risk. It has significant impacts, short and long-term on service delivery and financial position.
The wider SLT group meets every fortnight to consider the current position.

CCR 91 – Inadequate Information Governance Framework 6/16

Mandatory Data Protection Course in place and work is underway to implement a second intermediate level course for Service Heads/Information Asset Owners and Information Governance Coordinators to increase their level of knowledge. Both courses will also reflect data breach investigations to address and prevent further occurrence.
- An enhanced training exception report has been built with the Learning provider which highlights which staff and members have not yet completed training.
- Statutory DPO providing detailed GDPR expertise, advice and support with a recently introduced role of Information Governance Officer to support adherence to regulations and compliance.
- revised incident reporting framework and procedure in place, with investigation form completed for all breaches and learning taken forward and shared.
- Data Breaches are to be included in a Dashboard to SLT to enable effective response.

**RELEVANT
FINANCE ISSUES**

The Spending Review Announced on October 27th appeared to be positive news for local government but more details will be known from the settlement in December.

**ANY OTHER
ISSUES
CONSIDERED AT
THE MEETING (eg
staffing / resources)**

The Fit for the Future modernisation programme has undergone a stock-take following the appointment of a new Director. This is now largely complete and the programme will accelerate in next period as plans are finalised.

The People and OD Workstream has continued to make strong progress including the launch of the Leadership Development

	<p>Programme and we have received an indication that our well-being charter is going to be approved by the accreditor.</p> <p>The Technology and Digital Workstream has also continued to make strong progress, improving the resilience of our infrastructure and in the procurement of a Digital Platform which is nearing completion</p>																																				
<p>FOLLOW UP (any issues for consideration at the next meeting)</p>																																					
<p>PERFORMANCE MEASURES (see <i>Excelsis where applicable</i>)</p>	<p>This Committee meeting will be considering a range of performance measures relating to the new Council Plan.</p> <p>As Revenues and Benefits data largely relates to financial performance it is now to be included in S&R performance monitoring.</p> <table border="1" data-bbox="544 837 1305 1032"> <thead> <tr> <th>Current Year Collection</th> <th>2019/20</th> <th>2020/21</th> <th>2021/22</th> </tr> </thead> <tbody> <tr> <td>Council Tax</td> <td>57.19%</td> <td>55.65%</td> <td>55.84%</td> </tr> <tr> <td>Business Rates</td> <td>57.04%</td> <td>49.59%</td> <td>51.24%</td> </tr> </tbody> </table> <table border="1" data-bbox="544 1099 1305 1294"> <thead> <tr> <th>Council Tax arrears</th> <th>Cases</th> <th>Amount o/s (£)</th> </tr> </thead> <tbody> <tr> <td>September 2019</td> <td>3,942</td> <td>1,218,009</td> </tr> <tr> <td>September 2020</td> <td>5,537</td> <td>1,789,063</td> </tr> <tr> <td>September 2021</td> <td>7,028</td> <td>2,949,803</td> </tr> </tbody> </table> <table border="1" data-bbox="544 1361 1305 1556"> <thead> <tr> <th>Business Rates arrears</th> <th>Cases</th> <th>Amount o/s (£)</th> </tr> </thead> <tbody> <tr> <td>September 2019</td> <td>125</td> <td>273,074</td> </tr> <tr> <td>September 2020</td> <td>218</td> <td>1,389,751</td> </tr> <tr> <td>September 2021</td> <td>333</td> <td>1,546,142</td> </tr> </tbody> </table> <p>We have administered an extension to the Council Tax hardship scheme for 2021/22 providing an extra £150 in support for claimants, totalling £263,301.</p> <p>Consultation for our 2022/23 Council Tax support scheme has now begun. Proposal to introduce an income tolerance level of £10pw for changes of circumstances along with removal of a second adult rebate.</p>	Current Year Collection	2019/20	2020/21	2021/22	Council Tax	57.19%	55.65%	55.84%	Business Rates	57.04%	49.59%	51.24%	Council Tax arrears	Cases	Amount o/s (£)	September 2019	3,942	1,218,009	September 2020	5,537	1,789,063	September 2021	7,028	2,949,803	Business Rates arrears	Cases	Amount o/s (£)	September 2019	125	273,074	September 2020	218	1,389,751	September 2021	333	1,546,142
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	<p>Covid-19 has had a huge impact on collection. As restrictions have started to lift we have gently resumed normal enforcement work with continued signposting to help, advice and support.</p> <p>Despite the furlough scheme ending, we are starting to see a small reduction in Council Tax support claimants.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="text-align: left;">Council Tax Support</th> <th style="text-align: left;">Working Age</th> <th style="text-align: left;">Pension Age</th> <th style="text-align: left;">Amount (£)</th> </tr> </thead> <tbody> <tr> <td>September 2019</td> <td>2,871</td> <td>2,826</td> <td>5,786,312</td> </tr> <tr> <td>September 2020</td> <td>3,370</td> <td>2,810</td> <td>6,711,956</td> </tr> <tr> <td>September 2021</td> <td>3,210</td> <td>2,733</td> <td>6,655,570</td> </tr> </tbody> </table> <p>The Prime Minister has announced that the Test and Trace Support Payment scheme (TTSP) will continue until the end of March 2022, as part of the Government's COVID-19 response over the autumn and winter.</p> <p>July saw more cases (231) than any other month, along with August (181), with the previous highest month being November (127). From the inception of scheme in October through to May there were 373 applications. This has already been exceeded in the last 3.5 months from June to September with 511 applications.</p>	Council Tax Support	Working Age	Pension Age	Amount (£)	September 2019	2,871	2,826	5,786,312	September 2020	3,370	2,810	6,711,956	September 2021	3,210	2,733	6,655,570
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ANY ISSUES OF SIGNIFICANT CONCERN TO BE REPORTED TO AUDIT AND STANDARDS	
ANY ACTIONS/RECOMMENDATIONS FOR THE COMMITTEE	
REPORT SUBMITTED BY	Keith Pearson and Nick Housden
DATE OF REPORT	25/11/2021

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**Brimscombe Port
Members information Sheet
November 2021**

1 Introduction

- 1.1 The purpose of this Information Sheet is to update members on the current position with the redevelopment of Brimscombe Port. There is also an update in the Performance Monitoring report to this Committee.
- 1.2 The last update to committee was on the 30th September 2021. Where it was confirmed that vacant possession of the site had been achieved.

2 Demolition contract

- 2.1 Haywood Crushing Demolition Ltd (HCD) has been appointed and started demolition works on 25 October 2021. Site set up and soft strip of the buildings is being undertaken and discharge of Planning Conditions has been applied for. Once the relevant Planning Conditions have been discharged, asbestos stripping can begin, with other demolition works to follow. Now that HCD has been appointed, the application of a Flood Risk Activity Permit from the Environment Agency is underway which is required in order to carry out demolition works, other than asbestos strip, within 8m of the River Frome.

3 Procurement of a Developer

- 3.1 The process to procure a Developer was launched on 29 October 2021 with accompanying Press Release and media posts along with the video launched in September 2021. A Contracts Notice will have been issued to all Companies signed up to the Government's Contracts Finder. A wide range of companies have registered to access the dataroom where all information for the project can be found. The deadline for the receipt of the completed Supplier Questionnaires, the first stage of the process, is the 6 December 2021. The whole process is due to be completed by June 2022, subject to suitable bids being submitted.

4 Current Estimated Key Milestones

Activity	Estimated date
Demolition complete*	Apr 2022
Approval to appoint developer partner	May 2022
Development Agreement Completed	Jun 2022
Infrastructure can start	Jun 2022
Planning application submission	Jan 2023
Commencement of redevelopment	Oct 2023
Completion of redevelopment	Oct 2025

* The demolition of the curtilage Listed Port House, may be moved to June, depending on consent from the EA and the release of a planning condition regarding phasing.

5 Community Engagement & Comms Plan

- 5.1 An update regarding asbestos was posted on the Brimscombe Port webpage, as well as on social media on 11 November 2021 as concerns had been raised by local residents. A links to this information was shared with the Parish Council, local schools and individuals who had emailed.

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Brimscombe Port
Members information Sheet
November 2021

- 5.2 A leaflet has been delivered to every household within Brimscombe and Thrupp Parish, as well as a small area of Minchinhampton Parish, to provide background to the redevelopment proposals; to invite people to sign up for updates on the development and to invite them to a drop in session being held on Wednesday 17 November 2021 at The Ship Inn, Brimscombe. Members, Officers and Parish Councillors will be in attendance to have informal discussions about the project and answer any queries or concerns local residents may have.
- 5.3 In addition, the Project Team has had further meetings with the Parish Council and the focus is now on the vision for the community facility within the development.

STRATEGY AND RESOURCES COMMITTEE

25 NOVEMBER 2021

WORK PROGRAMME

Date of meeting	Matter to be considered	Reporting Member/Officer
13.01.22	Community Infrastructure Levy – Spending Allocations	Senior Community Infrastructure Officer
	Council Tax Support	Revenue & Benefits Manager
	Council Tax Discount for Care Leavers	Revenue & Benefits Manager
	Stroud Cemetery Chapel	Property Manager
	Canal Corridor Strategy	Strategic Director of Place
	Council Plan and Performance Indicators	Senior Policy & Governance Officer
	Budget Monitoring 2021/22 Q2	Accountancy Manager
	Member\Officer update reports: a) Leadership Gloucestershire Update b) Gloucestershire Economic Growth Joint Committee (GEGJC) c) Gloucestershire Economic Growth Scrutiny Committee (GEGSC) d) Regeneration & Investment Board e) Brimscombe Port Board f) Council Plan Update Q3	Chair & Chief Executive Chair & Chief Executive Councillor Turner Strategic Director of Place Regeneration Delivery Lead Chief Executive/Policy & Performance Officer
Work Programme		
27.01.22 Extraordinary Budget Meeting	SDC Capital Strategy	Strategic Director of Resources
	General Fund Budget 2022-23, Capital Programme and MTFP	Strategic Director of Resources
	HRA Budget 2022/23 and MTFP	Accountancy Manager
10.03.22	Play Areas Strategy	Head of Housing Services, Community Services Manager
	Economic Development Strategy and Action Plan	Senior Economic Development Specialist Head of Planning Strategy
	Asset Review	Property Manager
	Member\Officer update reports: a) Leadership Gloucestershire Update b) Performance Monitoring c) Gloucestershire Economic Growth Joint Committee (GEGJC) d) Gloucestershire Economic Growth Scrutiny Committee (GEGSC) e) Regeneration & Investment Board f) Brimscombe Port Board g) Council Plan Update Q4	Chair & Chief Executive Councillors Pearson & Housden Chair & Chief Executive Councillor Turner Strategic Director of Place Regeneration Delivery Lead Chief Executive/Policy & Performance Officer
	Work Programme	
07.04.22	Budget Monitoring Report 2021/22 Q3	Accountancy Manager

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	Member/Officer update reports: a) Leadership Gloucestershire Update b) Gloucestershire Economic Growth Joint Committee (GEGJC) c) Gloucestershire Economic Growth Scrutiny Committee (GEGSC) d) Regeneration & Investment Board e) Brimscombe Port Board	Chair & Chief Executive Chair & Chief Executive Councillor Turner Strategic Director of Place Regeneration Delivery Lead
	Work Programme	

Items for a future Meeting:

- Kingshill House – Date TBC - Property Manager
- CN2030 Update – Date TBC – Senior CN2030 Officer
- Leisure Review - Dependant on CS&L decision (December)

Items for Next Civic Year:

- Brimscombe Port Developer Partner – May 2022 – Head of Property Services
- Procurement Update – June 2022 – Senior Policy and Governance Officer