

TRAFFORD COUNCIL

Report to: Executive
Date: 24 October 2022
Report for: Decision
Report author: Corporate Director for Place

Report Title

Trafford Social Value Charter and Draft Social Value Action Plan

Summary

The report provides an update on Social Value in Trafford and how the approach to developing and implementing social value measures will be set by the Trafford Social Value Charter and accompanying outline draft Social Value Action Plan.

Recommendation(s)

It is recommended that the Executive:

- (i) Approves the Trafford Social Value Charter.
- (ii) Approves the outline draft Social Value Action Plan.

Contact person for access to background papers and further information:

Oliver Shimell (Inclusive Economy and Communities Manager) 07814060170
Nidi Etim (Principal Inclusive Economy and Communities Officer) 01619124085

Appendices

Appendix 1 Trafford Social Value Charter
Appendix 2 Outline Draft Social Value Action Plan
Appendix 3 STAR Trafford Annual Achievements Report 2021-2022

Background Papers: None

Implications:

Relationship to Policy Framework/Corporate Priorities	The Social Value Charter and Action Plan are closely aligned to the Council's three Corporate Priorities and are explicitly referenced in the draft Charter.
Relationship to GM Policy or Strategy Framework	The Charter and Action Plan have strong links to the Combined Authority's Social Value definition.
Financial	The delivery of the Action Plan will require additional resources and as part of the report, the Shared Prosperity Fund has been highlighted as a potential opportunity for short term funding.
Legal Implications:	The Public Services (Social Value) Act 2012 came into force on 31st January 2013. It is now a legal obligation for local authorities and other public bodies to consider the social good that could come from the procurement of services before they embark upon it. The Charter and Action Plan are key ways in which the Council is able to demonstrate its compliance with the Act.
Equality/Diversity Implications	None as a consequence of this report.
Sustainability Implications	There is the ongoing opportunity to ensure the offers made through Social Value have a clear remit to ensure sustainability is embedded in all activities where possible.
Carbon Reduction	There is the ongoing opportunity to ensure the offers made through Social Value and are able to assist and help promote carbon reduction activities within Trafford's communities.
Resource Implications e.g. Staffing / ICT / Assets	Additional resources are being investigated to ensure there is a coordinating role of the Social Value Charter and Action Plan.
Risk Management Implications	None as a consequence of this report.
Health & Wellbeing Implications	There is the ongoing opportunity to ensure the offers made through Social Value and are able to assist and help promote health and wellbeing within Trafford's communities.
Health and Safety Implications	None as a consequence of this report.

1. Background

- 1.1 Social Value is commonly seen in the context of deriving benefits from public sector contracts which generate social, economic and environmental benefits for local communities at no extra cost to the Council.
- 1.2 Social Value should both support and help drive all aspects of the recovery from the Covid pandemic and more recently the Cost-of-Living Crisis. There is an ongoing need to embed the wider consideration of Social Value in all parts of the Council and within partner organisations' activities and as such it is timely to develop a Social Value Charter and supporting Action Plan.
- 1.3 This report sets out the progress made to date in developing Social Value across Trafford. It is considered that producing a Social Value Charter and associated Action Plan will enable Trafford and its partners to build on the good work already delivered in this area.

2. Current Approach to Social Value

2.1 STAR

STAR Procurement has partnered with a number of Councils in Greater Manchester and exists to provide a high-quality procurement and consultancy service for the organisations it works with, that deliver real and tangible transformation and improvements within the area they serve. STAR Procurement invested in the Social Value Portal in April 2019 which captures measures and reports on Social Value delivered through procured contracts. This has resulted in automated processes and practices and has enabled the wider workforce to work more closely with Social Value through robust contract management. By considering Social Value at the outset, STAR Procurement working alongside the Councils it is partnered with, is able to maximise the return from money that is spent on 3rd party contracts. The results are reported quarterly through 5 STAR Measures at the STAR Board and Joint Committee. The measures are also shared periodically with the Trafford Audit Committee. The STAR Procurement Annual Achievements Report for 2021-2022 is set out in Appendix 3 to the report.

- 2.2 The Social Value Maturity Index is a self-assessment tool which measures how far Social Value has been embedded within an organisation. In February 2021, an assessment was undertaken and reported to the Council's Corporate Leadership Team. At that time the Council was assessed as overall "developing to becoming an innovator". The five stages are:-

- O: Minimum
- 1: Developing
- 2: Mature
- 3: Leader
- 4: Innovator

An action plan has been devised which references where we are in the Social Value maturity index against key themes. The Action plan also includes:-

- Ensuring managing and delivering Social Value as a responsibility for all officers including Social Value as a KPI in committee meetings and papers
- Updating Themes, Outcomes, Measures (TOMS) for local priorities annually, consult stakeholder and public sector bodies as part of the process
- Applying Social Value to all aspects of the Council e.g. grants planning etc.
- Creating a Social Value Steering Group with representation from across the Council and partner organisations.

2.3 STAR adopted the Themes, Outcomes, Measures (TOMS) approach in April 2019 in line with the implementation of the Social Value Portal to measure Social Value and apply it to all contracts over £50k. The TOMS are used to chart how well the Council and STAR, through the procurement process, are performing against the Social Value Maturity Index. It should be noted that the TOMS will continue to be assessed to ensure they are the most pertinent measures for Trafford. The assessments will take place jointly between the council and STAR Procurement.

2.4 **Trafford**

It is recognised that a cohesive and inclusive approach to Social Value is needed across the whole of the Council. A number of different teams are currently working to some extent on Social Value aspects, but it is crucial that this work is brought together and coordinated effectively to ensure benefits for the Council and the wider community.

2.5 There are significant benefits to be achieved from an effective Social Value process for both communities and businesses within Trafford. Section 3 of the report sets out a brief overview of a number of outcomes from good Social Value practice within Trafford.

2.6 The TOMS provide a useful measurement of progress against a range of measures for Social Value for both the Council and STAR Procurement, however, there is the opportunity to undertake more specific activities in linking the needs of Trafford's communities with the Social Value provision generated from companies contracting with the Council.

2.7 The Inclusive Economy and Communities Team have consulted with a range of local communities over the summer with a focus on the borough's Community Hubs about what their priority needs are in order to guide where assistance and offers of help and information can be provided. It is intended that this information will be collected on a regular basis and used to communicate with businesses as to where they should focus their Social Value commitments.

2.8 The initial consultation generated the following priorities from communities:

- Social isolation- tackling mental health, reducing physical barriers and improving access to travel and improving digital inclusion
- Poverty- access to emergency support for households e.g. debt and benefit advice
- Food support- affordability, access to community based provision and also culturally appropriate food
- Employment support- more community based provision
- Community based support- working with local community assets and ensuring accessibility for all
- Business engagement- all community hubs who responded already had good links with local businesses and wanted to build on this

3. Social Value Outcomes Within Trafford

3.1 Working with STAR Procurement on ensuring there has been good Social Value outcomes for Trafford's communities and businesses has generated a number of positive outcomes. All contracts over £50K are reported through the Social Value Portal. Over the course of 2021/22, STAR Procurement working with Trafford, has achieved notable successes which align closely with the principles contained within the proposed Charter, a number of which are set out below:

- The cumulative value of Social Value offered is 53% i.e., for every £1 spent, the Council has been offered 53p back in Social Value
- Trafford has secured a total of £24m of Social Value to date
- Spend being retained within Trafford and Greater Manchester is 76.4%

3.2 Positive examples of Social Value working in Trafford are provided below:-

Support for Trafford Hong Kong newcomers

Trafford has a number of people settling in the area coming in from Hong Kong as part of the British Nationals overseas programme. Exact numbers are not known but this is estimated to be in the region of at least 1,500 people. Under the scheme newcomers have the right to work in the UK but do not have any separate recourse to public funds including Government benefits or free access to any adult education training (apart from ESOL). In August 2021 the Trafford Hong Kongers wrote to Trafford Council asking for help in settling into the area and helping newcomers to move into employment.

Trafford Council worked with partners to deliver employment support to the newcomers using key organisations Social Value commitments as they could not be signed up to any of the mainstream programmes. An employment support event was organised by Trafford Council at UA92 on the 16 November 2021 and was attended by over 200 Hong Kong newcomers looking for help to

get them into work. The event was supported by a number of organisations' using their Social Value commitments including: -

- The Growth Company who deliver several employment support programmes in GM had employment specialists on hand to provide one to one advice to people on CVs and job applications
- UA92 provided the venue for free and gave advice on how to apply to University
- Momentic and the Business Growth Hub provided business advisers to speak to those wanting to start or grow a business in the UK
- Trafford College Group provided advice to people on available training and how to convert their qualifications in the UK
- Two recruitment agencies provided advice on accessing the UK jobs market and signed up a number of people onto their books to work with them directly

The event was successful in helping a number of the Hong Kongers move forward into employment and has been followed up with further employment and business support events over the past few months. This support would not have been possible without being able to utilise Social Value commitments as the Hong Kong newcomers were ineligible for any of the mainstream support the organisations offer.

Trafford Carers Centre

Through a contract with Trafford Carers Centre, significant Social Value benefits will be realised within Trafford which include:

- Over 25 local people employed on a full time basis for a year or the whole duration of the contract.
- An apprentice will be employed each year of the contract
- A number of initiatives to be undertaken to support older, disabled and vulnerable people to build stronger community networks throughout the course of the contract.
- A number of initiatives will be undertaken or supported to engage people in health interventions (e.g. stop smoking, obesity, alcoholism, drugs, etc) or wellbeing initiatives in the local community.

4. Social Value Steering Group

- 4.1 The Trafford Social Value Steering Group has been established to meet Trafford Partnership's commitment to promote and drive forward Social Value throughout the organisation and the supply chain, to benefit the whole community.

4.2 The main objectives of the Social Value Steering Group are:

- To develop monitor, review and update the Social Value Action Plan.
- Establish clear Social Value priorities for Trafford, including priority areas/groups where appropriate.
- Map identified needs across the borough so that these can be referenced in any contracts that are awarded.
- Map what Social Value is already being delivered, where good practice already exists and identifying opportunities to grow Social Value.
- Optimise the potential of Social Value through the planning process and in contracts, to build local community and voluntary sector capacity.
- Raise awareness of Social Value opportunities for local businesses, VCSFE organisations and local communities.
- Influence decision making forums in Trafford to account for Social value and capture Social Value impact on major programmes.

4.3 The Group includes representatives from across the Council such as Health, Customer Service, Development Management and relevant partner organisations including Trafford College, Trafford Council and Trafford CCG, Trafford Partnership and STAR Procurement and is responsible for ensuring that a strategic approach is taken to Social Value. The Social Value Steering Group is chaired by the Inclusive Economy and Communities Manager who is the day-to-day lead within the area supported by officers within the Inclusive Economy and Communities Team.

5. Social Value Charter

5.1 The proposed Social Value Charter (see Appendix 1) has been developed by the Social Value Steering Group following a review of best practice and consideration of local priorities. The proposed Charter sets out a range of broad principles that Trafford and its partners will work towards to fully embed Social Value in their operations, to ensure both communities and businesses benefit from Social Value commitments. These include:

- All our residents will have access to quality learning, training and jobs
- All our communities will be happy, healthy and safe
- All our businesses both large and small and town centres will be supported to recover and flourish for the benefit of everyone

5.2 The proposed Social Value Charter identifies a range of areas for focus and identifies where organisations may choose to undertake initiatives to support Social Value in Trafford. These activities and initiatives do not necessarily have a financial focus as their core but set out a range of opportunities that businesses of all sizes may be able to help local communities in Trafford.

5.3 The Social Value Steering Group will be responsible for communicating and seeking further support for the Charter from all sectors, and in the delivery, monitoring and review of the Action Plan. Further support for the Charter will initially include encouraging partner organisations to also adopt the Charter and take lead roles in delivering elements of the Action plan.

6. Draft Social Value Action Plan

6.1 An outline draft Social Value Action Plan (see Appendix 2) has been developed to support the broad principles of the Charter. The Plan is a 'live' document and will be further reviewed and developed to ensure it meets corporate priorities and local need.

6.2 The Plan has been developed following a review of best practice from across other areas and blending activities that are already happening or due to take place in Trafford. For example, the "Preston Model", has been referenced in the outline Action Plan and demonstrates how Social Value benefits may be generated through the Planning system with examples given on how the Local Plan could consider including a policy on Social Value to encourage all developments above an agreed threshold to maximise Social Value in the area.

6.3 The draft Action Plan focusses on a number of broad themes which are set out below.

- Internal Management
- Engagement
- Policy and Scope
- Outcomes and Measures
- Commissioning
- Procurement
- Governance

6.4 These themes are based on the Social Value Maturity index assessment for Trafford which identifies Trafford's progress in embedding Social Value across all areas. It builds on the work already done by STAR Procurement and the Council in developing actions to address the themes with the ambition to move Trafford from the current performance level of "Developing" to the highest level of "Innovator".

6.5 The Action Plan references the current status of how Trafford is performing against the Social Value Maturity index and what the desired outcome is for each theme as well as setting out initial actions to move towards the desired outcome.

6.6 The responsibility for the monitoring and updating of the outline Action Plan will be the responsibility of the Social Value Steering Group. The Action plan will be a standing item on each agenda where updates will be requested with progress against actions shared both within the Council and with partner organisations.

6.7 Both within the council and with partners, there is a strong desire to fully embed Social Value but to undertake a comprehensive approach to driving forward the agenda it is recognised there will be a need for a dedicated resource. In order to address this requirement, a project has been put forward as part of Trafford's Shared Prosperity Communities and Place Investment Plan, which is considered in another item on the Executive agenda, to fund a dedicated Social Value Co-ordinator.

7. Next steps

7.1 Once formal agreement of the Social Value Charter and Action Plan has been achieved, both documents will be circulated to key partners on the Social Value Steering Group to gain formal agreement and adoption from their respective organisations. A press release will need to be issued highlighting the agreement of the Charter and highlighting key areas of the Action Plan to be taken forward. The Steering Group will continue to meet on a regular basis to oversee the delivery and development of the Action Plan in line with the principles of the Charter.

Other Options

Option One – Continue with no change

The option of not having a Social Value Charter and draft Action Plan has been considered but is not preferred as Charter and Action Plan allows for Trafford and partner organisations to clearly set out their aspirations for Social Value in Trafford.

Option Two- Use existing resources

The use of nominated Social Value leads across all departments has also been considered. This option is not preferred as it would not provide sufficient resource to drive Social Value across wider stakeholders and across the Trafford Partnership.

Consultation

To produce the Charter and Action Plan, significant engagement has taken place with members of the Social Value Steering Group which is made up of representatives from within the Council and partner organisations.

Reasons for Recommendation

Having in place a clear Social Value Charter and Action Plan clarifies the Council's and partners' aspirations of how Social Value can play a significant role in supporting existing and emerging community needs and will help guide businesses in delivering their social value commitments.

Key Decision *(as defined in the Constitution)*: Yes

If Key Decision, has 28-day notice been given? Yes

Finance Officer Clearance PC
Legal Officer Clearance TR

[CORPORATE] DIRECTOR'S SIGNATURE (*electronic*)

A handwritten signature in black ink, appearing to be a stylized name followed by a horizontal line.

To confirm that the Financial and Legal Implications have been considered and the Executive Member has cleared the report.