



PEAKS & PLAINS
Housing Trust

The Trust

Social Value
Strategy

Version number:
V0.2 (Draft)

Effective Date: Nov
2021

TABLE OF CONTENTS

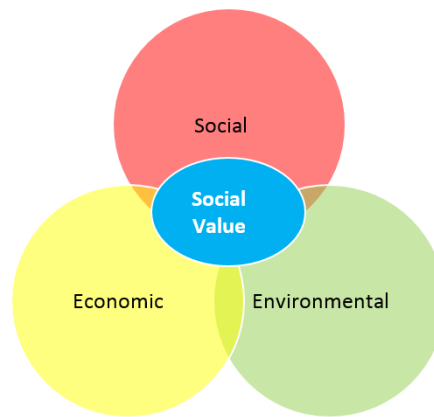
- 1. INTRODUCTION/BACKGROUND 1**
- 2. WHAT IS SOCIAL VALUE AND THE SOCIAL VALUE ACT 1**
- 3. AIMS OF THE STRATEGY..... 2**
- 4. DELIVERY, IMPLEMENTATION & RESPONSIBILITIES..... 3**
- 5. POLICY INFORMATION..... 4**
- 6. APPENDIX A – ASSOCIATED STRATEGIES, POLICIES, LAWS AND REGULATIONS..... 5**

1. INTRODUCTION/BACKGROUND

- 1.1. Peaks and Plains Housing Trust is a community benefit society registered under the Co-operative and Community Benefits societies Act 2014 driven with the main social purpose to 'Helping Improve Lives'.
- 1.2. We have generated social value through the creation of both our dedicated tenant sustainability and ASB teams, employing apprentices and facilitating the development of skills through training and work experience opportunities. Some of our activities include volunteering Trust staff resources and materials to completing works or services to local voluntary or community groups and working in partnership with local social enterprises. More recently responding to the impact of COVID-19 by making welfare calls to 800 of our most vulnerable tenants.
- 1.3. As a provider of social housing, the Trust has a legal obligation to consider economic, social and environmental well-being in connection with public services contracts over the EU threshold.
- 1.4. Peaks and Plains Housing Trust spends on average £20m every year with third parties on non-pay expenditure.
- 1.5. In June 2021, the Cabinet Office issued a Procurement Policy Note (PPN 05/21), providing information and guidance on the National Procurement Policy Statement and setting out the national priority outcomes that contracting authorities should consider alongside their local priorities in relation to social value.
- 1.6. In developing this Strategy, the Trust has engaged with the Challenge Group to help shape social value priorities. Key themes were centred on improving community spirit and well-being however, it was agreed that feedback should be sought from the wider community on the development of these priorities.
- 1.7. This Social Value Strategy sets out the Trust's approach to embedding social value through its activity to deliver further additional benefit to the community and how it will measure and report on its success.
- 1.8. This Social Value Strategy is intrinsically linked to our overarching mission of 'helping improve lives' and our Strategic Plan 2020 – 2023 to:
 - Be a great landlord
 - Be a resilient business
 - Create great places to live

2. WHAT IS SOCIAL VALUE AND THE SOCIAL VALUE ACT

- 2.1. Social Value refers to the wider financial and non-financial impacts of projects and programmes including supporting the strength and wellbeing of individuals and communities (social), strengthening the local economy through either sourcing services from local suppliers or enabling opportunities for local employment (economic) and the reducing of waste and impact on the environment (environmental).



- 2.2. In procurement, Social Value involves looking beyond the individual contract price and looking at ways of delivering further benefit making a tangible difference to our communities.
- 2.3. The Public Services (Social Value) Act 2012 came into force in January 2013 and requires 'public authorities to have regard to economic, social and environmental well-being' when procuring services contracts subject to the Public Contracts Regulations 2015.
- 2.4. The Trust intends to further commit itself to delivering Social Value by going beyond the Act's requirements and implementing Social Value into all aspects of its procurement activity where it is practicable and proportionate to do so ensuring that money and resources are managed in a way that maximises the benefits for its residents and the wider community whilst still achieving overall Value for Money

3. AIMS OF THE STRATEGY

- 3.1. The aim of this Strategy is to ensure that our procurement activity delivers social value across the Trust whilst ensuring value for money.
- 3.2. In line with the National Procurement Priority Statement, the Trust will focus its efforts on implementing the following social value priorities within its procurement:
 - 3.2.1. **Creating new businesses, new jobs and new skills**
Working with local partners, contractors and suppliers to identify opportunities and facilitate training and the development of residents' skills to support people into employment.
 - 3.2.2. **Tackling climate change and reducing waste**
Procurement activity will support the delivery of the Trust's Environmental Strategy 2021-2024.
 - 3.2.3. **Improving supplier diversity, innovation and resilience**
Increase opportunities for Small and Medium Enterprises (SMEs) and Voluntary organisations, Community groups and Social Enterprises (VCSEs).

- 3.3. Further to the national priorities, we will continue to engage with our tenants and local social enterprises to gain feedback into how we can further support our community through the creation of any local priorities.

4. DELIVERY, IMPLEMENTATION & RESPONSIBILITIES

- 4.1. While the Public Services (Social Value) Act 2012 only requires social value to be considered in Services contracts (and goods or works contracts where there is an element of services) with a contract value above the EU thresholds, the Trust will deliver social value through all services, goods and works of any scale unless being procured through a framework agreement.
- 4.2. A minimum weighting of 10% of the overall quality score will be applied to all procurement tenders over £50,000 to ensure this sets expectations on the importance of social value within the Trust and ensures a meaningful but proportionate impact.
- 4.3. Social Value will be embedded throughout the Procurement lifecycle and will be relevant and proportionate to each individual procurement exercise.
- 4.4. Delivery of the Social Value strategy will be reviewed by the Value for Money Steering group with 6 monthly reporting to the Executive Management Team.
- 4.5. Individual budget holders and delegated individuals are responsible for:
- 4.5.1. Including relevant and proportionate Social Value criteria within their procurement in line with this Social Value Strategy subject to the mechanics of existing frameworks that may impose their own set of social value criteria.
- 4.5.2. Applying the same contract management approach to social value as they would to quality, performance and finance by developing social value KPIs to monitor and record against throughout the contract lifespan.
- 4.5.3. Measuring and reporting the social value that has been generated through the contracts that they manage.
- 4.6. The Procurement & Risk Manager:
- 4.6.1. Will be responsible for creating and maintaining a social value toolkit for the Trust to use across its procurement activity.
- 4.6.2. Will ensure staff have the required training and guidance to improve social value outcomes.
- 4.6.3. Will continuously improve our approach to social value including but not limited to creating standard procurement templates and contractual clauses and providing guidance and training as new social value priorities are identified.

- 4.6.4. Will provide annual reporting on effectiveness of the Social Value Strategy and delivery of the social value action plan to the Board, and will work with key stakeholders to develop and deliver social value reporting that will be made available on the Trusts external website.
- 4.7. This Strategy will be reviewed on a 3 year cycle, unless there are changes to regulation or process that require it to be changed more frequently.

5. HOW WILL WE MEASURE SOCIAL VALUE

- 5.1. As part of delivering this Strategy, we will define how we measure the successful delivery of Social Value through measuring inputs and outcomes utilising a suite of financial and non-financial performance metrics which will be reported to the Performance Management Group.

POLICY INFORMATION

Policy Name:	Social Value Strategy
Status:	V0.2
Approved by:	Board
Drafted By:	Sarah Hogg-Robinson, Procurement & Risk Manager
Date approved:	November 2021
Next Review Date:	November 2024

APPENDIX A – ASSOCIATED STRATEGIES, POLICIES, LAWS AND REGULATIONS

Where relevant, all Procurement activity must comply with:

- Social Value Act 2012 – requires us to consider how through procurement, we may improve social, economic and environmental well-being of the area for contracts exceeding the OJEU thresholds.
- The Trusts Environmental Strategy
- The Trusts Procurement Strategy
- The Trusts Procurement policy
- The Trusts Development Strategy