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**Report to CABINET**

# **Approval of the Adoption and Publication of Oldham Council's Social Value Policy**

**Portfolio Holder:**

Cllr Abdul Jabbar, Cabinet Member for Finance & Corporate Resources

**Officer Contact:** Sarah Johnston, Director of Finance

**Report Author:** Emily Molden

**Ext.** N/A

**18<sup>th</sup> March 2024**

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## **Reason for Decision**

To approve the adoption of the Council's first social value policy which will set out the approach within commissioning, procurement, and other wider practices as well as the approach to working with staff, partners, suppliers, and service providers to ensure additional benefits are delivered through all council activity, creating the best possible outcomes for our residents and communities.

## **Executive Summary**

Social value was first introduced by The Public Services (Social Value) Act 2012 of which the Council responded to by implementing an Oldham specific social value framework and mandated weighted questions in all tenders. Through the years this framework approach has developed and evolved to the adoption of the National TOMs (themes, outcomes, and measures) and creation of the Oldham TOMs.

A review of the Council's social value journey was undertaken in 2022, recognizing achievements but also identifying improvement areas to ensure our aim in becoming a leader in embedding social value is achieved. One such of those areas is regarding governance and accountability and having a published policy and strategy.

The Social Value Portal have been working alongside key stakeholders within the Council to design and produce a policy which details our approach and future ambitions, the final draft of which is at appendix 1.

In parallel to this, a review also undertaken by the Social Value Portal to the Council's Local Needs Analysis. This document includes a summary of insights to highlight the areas of highest deprivation, needs within the local community and priorities identified by Oldham Council. It aims to provide guidance for stakeholders, suppliers, developers, contractors, and others working in Oldham to develop more robust social value strategies.

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A workshop was held to discuss the content of the analysis stemming from the Council's and the Borough's needs and priorities; the final draft can be found at appendix 4.

### **Recommendations**

1. To approve the policy and its publication, formally documenting the Council's approach and commitment to social value. The policy will be available for our partners, suppliers, and the community strengthening our commitment.
2. To approve the revised local needs analysis, documenting the needs and priorities of the Council and the wider community. This will be published on the Council's website and with all tendering opportunities, improving social value commitments proposed by bidders ensuring they are relevant to Oldham and its residents.

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## Approval of the Adoption and Publication of Oldham Council's Social Value Policy

### 1 Background

- 1.1 Social value was first introduced by The Public Services (Social Value) Act 2012 which came into effect in 2013. The act placed responsibility on public sector organizations, and their suppliers to consider how wider economic, community and environmental benefits could be delivered as part of commissioning goods, works and services.
- 1.2 Oldham Council responded by producing a social value framework, which addressed the needs and aspirations of the Borough and mandating weighted questions to be included in all tendering activity. This activity was all done prior to the initial implementation date of the 1<sup>st</sup> of January 2013 and as a result Oldham were recognised nationally and case studies of contracts were featured in Lord Young's Social Value Act Review.
- 1.3 Since 2012 several reviews of the framework took place to ensure the outcomes continued to be relevant.
- 1.4 However, in 2020 a decision was made to adopt the National TOMs (themes, outcomes and measures) produced by the Social Value Portal and the National Social Value Taskforce in 2017. The needs and priorities identified within various Council policies and plans such as the Corporate Plan have been mapped to the TOM system to develop a set of Oldham specific TOMs. Please see appendix 2 for more information on the Oldham TOMs.
- 1.5 Social value is embedded within all commissioning and procurement practices, with bidders committing to deliver any of the TOMs.

### 2 Current Position

- 2.1 A review was undertaken in 2022 to evaluate the journey the Council have taken in implementing and delivering the Social Value Act in the way of a Social Value Maturity Index (SVMI). It recognised the achievements to date but then also identified areas of improvement.
- 2.2 One area of improvement identified was regarding governance and accountability by having a published social value policy and strategy. Following this recommendation, the Social Value Portal were commissioned to support in the development of the policy. The policy is to be a published statement to govern the Council's approach to social value and working with our partners and the wider community.
- 2.3 The Social Value Portal started by initially reviewing existing Council policies and plans and undertaking a peer review of the approach taken by other authorities. Once this review had taken place interviews were held. to understand goals and aspirations and what social value means in Oldham. The interviewees consisted of the following:
  - Paul Clifford (Director of Economy)
  - Chris Lewis (Strategic Lead – Creating a Better Place)
  - Jonathan Downs (Corporate Policy Lead)
  - Jon Bloor (Assistant Director of Economic Growth)
  - Rachel Dyson (Thriving Communities Hub Lead)
  - Emily Molden (Senior Category Manager)

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- 2.4 Several drafts were reviewed by the panel above and the final version can be found at appendix 1. This policy is to be in place for a 5-year term with a review to be completed after 3 years.
- 2.5 Running in parallel to the creation of the policy is an update to the Council's Local Needs Analysis. This is a document which includes a summary of insights to highlight the areas of highest deprivation, needs within the local community and priorities identified by Oldham Council. It aims to provide guidance for stakeholders, suppliers, developers, contractors, and others working in Oldham to develop more robust social value strategies. The Social Value Portal were again commissioned to lead on this.
- 2.6 A workshop (chaired by the Social Value Portal) was held with key stakeholders from the Council and external organisations including Action Together. The workshop looked to provide an overview of the current needs analysis and seek insights and views from the attendees on what should be included in the document.
- 2.7 Following on from the workshop a series of drafts were produced, each reviewed by the workshop attendees and a final version can be found at appendix 4.
- 2.8 Further work to progress the social value journey within the Council to maximise benefits for the Borough's residents and business and voluntary community is scheduled in the form of:
- Developing guidance for suppliers / businesses / VCSEs on the TOMs approach specific to Oldham along with training sessions to support in upskilling.
  - Training and guidance on social value for Council staff to ensure social value is applied effectively and embedded across the organisation
  - Reviewing the Council's 'As Is' position and plotting the 'To Be' position.]
  - Explore the inclusion of Social Value outcomes within the Corporate Performance Reporting framework.
  - Produce a social value statement to report on successes and support continuous improvement.
  - Building on the workshop approach to establish a corporate Social Value Task & Finish Group chaired by the Director of Economy to take this activity forward.

### 3 Options/Alternatives

- 3.1 **Option 1:** To approve the policy and its publication, formally documenting the Council's approach and commitment to social value. The policy will be available for our partners, suppliers, and the community strengthening our commitment.

To approve the revised local needs analysis, documenting the needs and priorities of the Council and the wider community. This will be published on the Council's website and with all tendering opportunities, improving social value commitments proposed by bidders ensuring they are relevant to Oldham and its residents.

**Option 2:** To not approve the policy and its publication. The Council would not have in place a formalized policy to govern the approach to securing social value and further progressing in shaping and leading on the delivery of social value.

To not approve the revised local needs analysis, continuing with the current version developed in 2020. This version is now out of date and does not reflect the Borough's needs.

### 4 Preferred Option

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- 4.1 **Option 1:** To approve the policy and its publication, formally documenting the Council's approach and commitment to social value. The policy will be available for our partners, suppliers, and the community strengthening our commitment.

To approve the revised local needs analysis, documenting the needs and priorities of the Council and the wider community. This will be published on the Council's website and with all tendering opportunities, improving social value commitments proposed by bidders ensuring they are relevant to Oldham and its residents.

## 5 **Consultation**

- 5.1 Interviews were conducted with the panel named above of which their thoughts and information contributed to the final draft of the policy.

## 6 **Financial Implications**

- 6.1 The preferred option as detailed in paragraph 4.1 is to approve the Council's Social Value Policy and its publication, formally documenting the Council's approach to social value.

There are no direct financial implications associated with approving the policy, however, if the policy is approved, it will need to be embedded within all future commissioning and procurement practices.

(Matthew Kearns – Finance Manager)

## 7 **Legal Implications**

- 7.1 The Social Value Policy document doesn't raise any legal issues. It is recommended that a copyright statement is added to the document together with document control annotations. All Oldham Council's standard terms and agreements include provisions relating to Social Value. The Council's standard agreements include provisions detailing obligations to deliver Social Value Activities and specify remedies for non-performance including liquidated damages and termination. (Mark Hope, Legal and Democratic Services)

## 8. **Co-operative Agenda**

- 8.1 Social value enables the Council to maximise benefits, including employment opportunities, for Oldham residents and communities and hence supports delivery of the Council's Co-operative agenda.

## 9 **Human Resource Implications**

- 9.1 Whilst there are no workforce implications as such, consideration should be given to the education, learning and training to ensure anyone involved in commissioning providers in the future are aware of the changes. (Rebecca Tyrer)

## 10 **Risk Assessment**

- 10.1 The Council is recommending that a Social Value policy is approved and published which will formally documenting the Council's approach and commitment to social value. The Council needs to ensure the policy is embedded within the Council and for all procurement, however as this has been already implemented in a different form for a number of years the risk of this is low.

Vicki Gallacher (Head of Insurance and Information Management)

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- 11 **IT Implications**
- 11.1 None
- 12 **Property Implications**
- 12.1 None
- 13 **Procurement Implications**
- 13.1 Procurement support the recommendation to approve the policy and its publication, formally documenting the Council's approach and commitment to social value. (Dan Cheetham).
- 14 **Environmental and Health & Safety Implications**
- 14.1 None
- 15 **Community cohesion, including crime and disorder implications in accordance with Section 17 of the Crime and Disorder Act 1998**
- 15.1 None
- 16 **Equality impact**
- 16.1 The Social Value Policy and Oldham TOMs aim to have a positive effect on the entire community including children and young people, supporting where possible. More information can be found in the impact assessment at appendix 3.
- 17 **Oldham Impact Assessment, including implications for children and young people**
- 17.1 Yes – Please see appendix 3 IA Report – Social Value Policy
- 18 **Key Decision**
- 18.1 Yes
- 19 **Key Decision Reference**
- 19.1 FLC-17-23.
- 20 **Background Papers**
- 20.1 None
- 21 **Appendices**
- 21.1 Please see below:
- Appendix 1 – Social Value Policy
  - Appendix 2 – Oldham Master TOMs
  - Appendix 3 – IA Report Social Value Policy
  - Appendix 4 – Local Needs Analysis
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