Introduction to The National TOMs for Wales

Stakeholder engagement 2020
Thank you for your interest in providing feedback for the Stakeholder Outreach and Feedback Survey for the National TOMs for Wales (NT for Wales) development. The NT for Wales is a framework for social value measurement and management that allows for an unlocking of social value through its integration into procurement and project management.

The NT for Wales have been developed by The Social Value Portal on behalf of Welsh Local Government Association supported by the National Social Value Taskforce Wales (NSVT Wales). The NSVT Wales is a stakeholder forum comprising of public sector bodies and entities including Welsh Government (Community Benefits Team), The Office of The Future Generations Officer, Transport for Wales as well as a number of councils and housing associations.

Based on initial consultation between the members of the NSVT Wales the NT for Wales are being developed as a welsh social value measurement and management framework that links the UK wide National TOMs framework to the Welsh Future Generations Act and other relevant local initiatives and legislation.

This regional stakeholder consultation survey has been designed to get feedback from a wider set of regional stakeholders beyond the initial NSVT Wales and to allow for a further linking of the NT for Wales to local community needs and priorities.

You can find the survey here: Online survey link: https://socialvalueportal.typeform.com/to/HuTC51nf

This power point has been designed to provide some background information and case studies to help you understand how the TOMs may be used

We would be very grateful if you could take the time to first look at the documents provided with this survey, as well as the webinars, and then provide any feedback and comments on the questions provided below.

For your feedback to be considered for the further NT Wales development process it must be provided at latest on the 28th August 2020. Any questions please email Philip Cyrus.
Contents

Social Value Portal
The National TOMs for Wales – Overview
The National TOMs – How do they work
Case studies
The National TOMs for Wales
The Social Value Portal is the market leader in social value measurement and reporting.

Our management tool helps organisations calculate their social value in terms of environmental, social and economic contributions.

We want to help you to measure, manage and maximise your broader contribution to society.

**MEASUREMENT**
A nationally approved accounting methodology for measuring social value in terms of economic, environmental and social impact

**PROCUREMENT**
A procurement platform for social value to help organisations manage the tender process and to unlock social value in the supply chain

**CONTRACT MANAGEMENT**
An interactive solution designed to help organisations set targets and manage performance and store evidence

**REPORTING**
Live reporting with interactive dashboards and displays including geospatial mapping of value by area

The TOMs are mapped against the Global Goals

The Social Value Portal is the developer of the National TOMs for Wales.
What have we delivered to date?

The additional value created for communities through the social, economic and environmental initiatives an organisation takes or delivers through its projects

- **£13.8bn**
  Total value of contracts through portal to date

- **£2.1bn**
  Total local spend

- **705,000**
  Total no. volunteering hours unlocked

- **1,480**
  Total no. jobs registered for disadvantaged people

- **+25%**
  Average % social value delivered across public sector procurements

- **1,597**
  Total number of projects under management

**Q4 2019**

Average % social value delivered across public sector procurements
Overview
Overview (1)

We are delighted to attach a copy of the proposed National TOMs for Wales that have been developed by Welsh LGA and Social Value Portal with support from the Welsh Government Community Benefits team and the TOMs for Wales Social Value Taskforce along with a number of Council and Housing Associations.

The Draft National TOMs for Wales (Version 8) is a culmination of work since the beginning of March and has included a wide range of meetings and discussions and as a member of the Taskforce we are now seeking views from across Wales by 28th August 2020 in preparation for their release and publication in October 2020.

The National TOMs for Wales have been specifically designed to help organisation measure and maximise the social value they create through the delivery of their services across the 7 Wellbeing Goals and importantly they will allow organisations to report value created as a financial contribution to society.

The National TOMs for Wales have grown out of the National TOMs which have been used widely across since their launch in 2017. They have been endorsed by the Local Government Organisation (LGA) and are supported by the Crown Commercial Services and are open sourced under a creative commons licence. Since their launch in 2017 the National TOMs have been downloaded over 4000 times across all sectors and have become one of the most used methodologies for measuring social value in the UK.

The TOMs are updated annually and the third edition was released in January 2020 to including a significantly enhanced environmental section with a further update in April 2020 in response to Covid-19 pandemic. The National TOMs also includes a family of sector specific ‘plug-ins’ including Health, Real Estate and Facilities Management. In addition, the TOMs have been mapped against the Global Goals for Sustainable Development allowing organisations to report their contribution to a wider global agenda.
Overview (2)

How should the National TOMs for Wales be used?

The National TOMs for Wales have been developed to specifically support the procurement and contract management process and have been designed to measure the additional social value being offered as a part of the contract in addition to the core services. Because the TOMs include financial valuations of each proposed activity, they allow buyers to assess not only the quality of a social value offer but also the quantitative value. The National TOMs for Wales have been developed to include all requirements of the Community Benefits Calculator and may be used for reporting purposes.

Key benefits include

- Learning from 3 years of experience and feedback from users
- Provide a consistent measurement solution
- Create a level playing field for business
- Allows benchmarking
- Mapped against the Future Generations Goals
Working Group – TOMs Taskforce

Sarah Jane Waith – Transport for Wales
Natalie Rees Transport for Wales
KJ Morgan – Cardiff University
Olivia Hughes - Flintshire Council
Brendan Burke - Welsh Government
Jackie Kay – Welsh Government
Steve Robinson- Cardiff Council
Gemma Ilis - RCTCBC
Marion Stapleton- Welsh Government
Karen Bellis - Denbighshire
Vincent Hanly - Powys.gov.uk;
Scott James - Monmouthshire.gov.uk;
Alice – FG Procurement Commission

Nick Abbott - linc-cymru.co.uk;
Jim Allen - tuc.org.uk;
Stuart - sustainablesupplychainsltd.co.uk
Richard Dooner - WLGA
Alicja Slawik - Cardiff Council
Hayley MacNamara - chcymru
Helen Hapgood - wwwa.co.uk;
Kimberley Mason - Denbighshire Council
Evans Arwel – Gwynedd Llyw Cymru
Andrew Gooding – Caerphilly Council
Justine Scorrer - Linc-Cmru

Social Value Portal
Guy Battle - Speaker
Philip Cyrus - Speaker
TOMs for Wales Taskforce Contributors

The following organisations have contributed to the development of the TOMs for Wales

**Steve Robinson - Cardiff Council - Chair**
**Richard Dooner – WLGA**
Sarah Jane Waith – Transport for Wales
Natalie Rees Transport for Wales
KJ Morgan – Cardiff University
Olivia Hughes - Flintshire Council
Brendan Burke - Welsh Government Community Benefits team
Jackie Kay – Welsh Government
Gemma Ellis - RCTCBC
Marion Stapleton- Welsh Government
Karen Bellis - Denbighshire
Vincent Hanly – Powys Council
Scott James – Monmouthshire Council
Alice – FG Procurement Commission

Nick Abbott - Linc-cymru
Jim Allen - TUC
Alicja Slawik - Cardiff Council
Hayley MacNamara - CHCymru
Helen Hapgood - WWHA
Kimberley Mason - Denbighshire Council
Evans Arwel – Gwynedd Llyw Cymru
Ian Evans – Caerphilly Council
Andrew Gooding – Caerphilly Council
Justine Scorrer - Linc-Cmru

**Social Value Portal**
Guy Battle – Executive Lead
Philip Cyrus – Senior Researcher
# National TOMs for Wales - Programme

<table>
<thead>
<tr>
<th>Key</th>
<th>Issue or Review by date</th>
<th>Meeting date</th>
<th>Ref</th>
<th>Item</th>
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<th>May-20</th>
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We have extended the consultation for those who cannot make meeting 1. Meeting 2 will be the same format, but giving people a bit more time if needed.

Could be new OR retropective projects.
The National TOMs for Wales
The National TOMs for Wales

First released in 2017
Updated annually
Designed for use by Public, private and third sector

5 THEMES
20 OUTCOMES
48 MEASURES

ONE MEASUREMENT & REPORTING STANDARD

Benefits
• Co-designed with stakeholders based on their measurement needs
• Benefits from extensive use across over 2500 projects with regular feedback from users
• Provides a consistent measurement solution
• Create a level playing field for business
• Allows benchmarking
• Has become the default measurement solution being used by over 100 councils across England and Wales
• Mapped against the UN Global Goals for Sustainable Development and Future Generations Act
The National TOMs

TOMs 2.0 + Covid 19 Plug In

Updated methodology:

• Incorporating clients’ feedback
• ‘Quality proofed’ against upcoming sector standards (e.g. BSI)
• Updated based on broad consultation and engagement exercise (National TOMs engagement survey)

EXTENSIONS

➢ CLIMATE EMERGENCY AND ENVIRONMENT
  • Climate emergency response
  • Circular Economy

➢ FACILITIES and PROPERTY MANAGEMENT PLUG IN

➢ PLANNING

➢ WELSH TOMs

GLOBAL GOALS

Mapping and dashboards
The National TOMs Measurement Framework is structured as a series of Themes, Outcomes and Measures

- Social Value measurement happens at the Measure level of the framework, with financial proxy values informing the total Social Value impacts captured

### Theme | Outcome | Measures | Units | Value
--- | --- | --- | --- | ---
Jobs | More local people in employment | No. Young Offenders | No. people | £23,119/pp
 | More opportunities for local SMEs and VCSEs | No. Voluntary hours | No. hrs | £16.07/hr
 | More working with the community | Spend in local supply chain | £ spent | Local spend
Growth | Vulnerable people are helped to live independently | Reduced CO2e | tCO2e | £69.35/tCO2e
Social | Carbon emissions are reduced
Environment | Air pollution is reduced
Innovation

```
Total Social Value = Sum(Measures * Value)
```
### National TOMs Framework

#### Themes and Outcomes

<table>
<thead>
<tr>
<th>Theme</th>
<th>Outcomes</th>
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<tbody>
<tr>
<td><strong>Jobs: Promote Local Skills and Employment</strong></td>
<td>More local people in employment</td>
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<td>More opportunities for disadvantaged people</td>
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<td>Improved skills</td>
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<td>Improved employability of young people</td>
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<td><strong>Growth: Supporting Growth of Responsible Regional Business</strong></td>
<td>More opportunities for local MSMEs and VCSEs</td>
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<td>Improving staff wellbeing and mental health</td>
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<td>Reducing inequalities</td>
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<td>Ethical Procurement is promoted</td>
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<td></td>
<td>Social Value embedded in the supply chain</td>
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<tr>
<td><strong>Social: Healthier, Safer and more Resilient Communities</strong></td>
<td>Creating a healthier community</td>
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<td></td>
<td>Vulnerable people are helped to live independently</td>
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<tr>
<td></td>
<td>More working with the Community</td>
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<tr>
<td><strong>Environment: Decarbonising and Safeguarding our World</strong></td>
<td>Carbon emissions are reduced</td>
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<td></td>
<td>Air pollution is reduced</td>
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<tr>
<td></td>
<td>Safeguarding the natural environment</td>
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<tr>
<td></td>
<td>Sustainable Procurement is promoted</td>
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<tr>
<td><strong>Innovation: Promoting Social Innovation</strong></td>
<td>Social innovation to create local skills and employment</td>
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<td>Social innovation to support responsible business</td>
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<td>Social innovation to enable healthier safer and more resilient communities</td>
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<td></td>
<td>Social innovation to safeguard the environment and respond to the climate emergency</td>
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</table>

The National TOMs Measurement Framework has been designed to provide a reporting standard for measuring and managing social value.

Addressing the needs of communities across the UK
Case Studies
The Social Value Act

The Social Value Act is transforming the relationship between business and the public sector – what more can business do?

How are Councils applying the Act?

• **SCOPE**: Generally being embedded in new procurements and contract management across goods, works, services

• **THRESHOLDS**: All contracts above a minimum threshold of £50,000 (Bristol is at £25,000)

• **WEIGHTINGS**: These vary, but leading Councils moving toward standalone
  - Manchester OVER 20%
  - Bristol 15%
  - WMCA 15%
  - Islington Council 10%

• **PLANNING**: Leading councils such as Islington and Coventry are now looking at how social value may be integrated into planning
Solihull Metropolitan Borough Council (SMBC) sought to replace tills in approximately 70 secondary and primary schools, to be managed by Solihull Catering Service.

The contract involves delivery, installation, ongoing maintenance and training. Both leasing and purchasing options were considered.

SMBC was looking for a hands-on approach when it comes to implementation so that deadlines are met and a continuing relationship that is both innovative and forward-looking throughout the period of the contract.

The contract was suitable for delivery by a VCSE or SME.

**Est. Contract Value:** £250-500k

**Contract Term:** 5 years (+3 year extension option)
SMBC are weighting social value at 5-20%, depending on contract type. For the School Tills contract social value was weighted at 15%, as a standalone evaluation criteria.

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<thead>
<tr>
<th>Criteria</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Quality</td>
<td>40%</td>
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<tr>
<td>Price</td>
<td>45%</td>
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<tr>
<td>Social Value</td>
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<tr>
<td>Quantitative</td>
<td>7.5%</td>
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<td><strong>TOTAL</strong></td>
<td><strong>100%</strong></td>
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</table>
6 social value proposals were submitted, 1 bidder chose not to commit SV targets. These showed that there was no correlation between a high social value bid and a higher financial proposal.

Bidder 3 won the project due to best combination of price, quality and social value

Bidder 5 ranked highest in the scoring of social value
We worked with Legal & General Real Assets to measure and maximise the social value being delivered at 245 Hammersmith Road. Total social value delivered was £28.2m representing 28% of the construction costs. Targets were exceeded by 211%. 

### Case Study – 245 Hammersmith Road

**Total Social Value delivered**

- **£28.2m**
- **£21.4m** Social Value add
- **£4.7m** Social Value add
- **£42.5k** Social Value add

**Contract Value:** £300m
**Social Value Add:** 28%

### Local skills & employment

- **153** local people employed
- **2** NEETs employed
- **14 weeks** work placements
- **708 weeks** training opportunities

### Local contributions

- **£1.46m** S106 contributions to cycle hire, economic development and highways
- **£585k** CIL contributions

### Protecting & improving our environment

- **26,654t** waste diverted from landfill
- **148t** carbon emission savings

### Stronger, healthier communities

- **440 hours** community volunteering
- **£600** donations to local community projects
National TOMs for Wales
The National TOMs for Wales are scheduled to release on October 2020. They are based on the learnings from the National TOMs development process, but reflect the specific requirements of the Commissioner and the WBFG Act AND of the Welsh Government Community Benefits Programme

- Provides a single set of measures for public organisations to report against
- Create a level (and consistent) playing field for the supply chain
- Based on non-financial performance but allow ££ value to be reported
- Allows comparison and benchmarking – what does ‘good look like’?
The National TOMs for Wales consist of:

- 7 Goals
- 37 OUTCOMES
- 61 CORE and 48 ADDITIONAL MEASURES

ONE MEASUREMENT & REPORTING STANDARD

Benefits
- Co-designed with Welsh stakeholders based on their measurement needs
- Provide a consistent measurement solution across the country
- Create a level playing field for business
- Allows benchmarking
- Allows reporting against the WBFG Act
The National TOMs for Wales liked to the WBFG Act

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<thead>
<tr>
<th>Themes (Goals)</th>
<th>Outcomes</th>
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<tbody>
<tr>
<td>A prosperous Wales</td>
<td>More people in employment</td>
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<td>Improved skills for people</td>
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<td>Improved skills for a low carbon transition</td>
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<td>More opportunities for SMEs</td>
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<td>Resource efficiency and the circular economy are promoted</td>
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<td>Retaining jobs and skills during the COVID-19 crisis</td>
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<td>Innovation to support a more prosperous Wales</td>
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<td>Carbon Emissions are reduced</td>
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<td>Ethical procurement is promoted globally</td>
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<td>COVID-19 environmental response</td>
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<td>Innovation to support a globally responsible Wales</td>
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<td>Green spaces and biodiversity are protected and enhanced</td>
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<td>Safeguarding the environment</td>
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<td>Creating a healthier community</td>
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<td>Air Pollution is reduced</td>
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<td>Improving staff wellbeing</td>
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<th>Themes (Goals)</th>
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<tr>
<td>A more equal Wales</td>
<td>More opportunities for disadvantaged people</td>
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<td>Reducing inequalities</td>
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<td>More support for target curriculum activities</td>
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<td>Improved employability of young people</td>
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<td>Ethical procurement is promoted in Wales</td>
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<td>More opportunities for VCSEs (Voluntary, Community and Social Enterprises)</td>
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<td>Social Value embedded in the supply chain</td>
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<td>A workforce and culture that reflect the diversity of the local community</td>
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<td>Crime is reduced</td>
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<td>Vulnerable people helped to live independently</td>
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<td>More working with the Community</td>
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<td>Native wildlife, nature and heritage sites are protected</td>
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<td>Innovation to support a more vibrant culture</td>
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<thead>
<tr>
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<tbody>
<tr>
<td>A resilient Wales</td>
<td>A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change</td>
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<tr>
<td>A globally responsible Wales</td>
<td>A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being</td>
</tr>
<tr>
<td>A society which people’s physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood</td>
<td></td>
</tr>
</tbody>
</table>

The seven WBFG Act Goals inform the Themes for the National TOMs for Wales. The Outcomes are allocated to each Theme according to its definition in the WBFG Act.