



Social Value Maturity Index

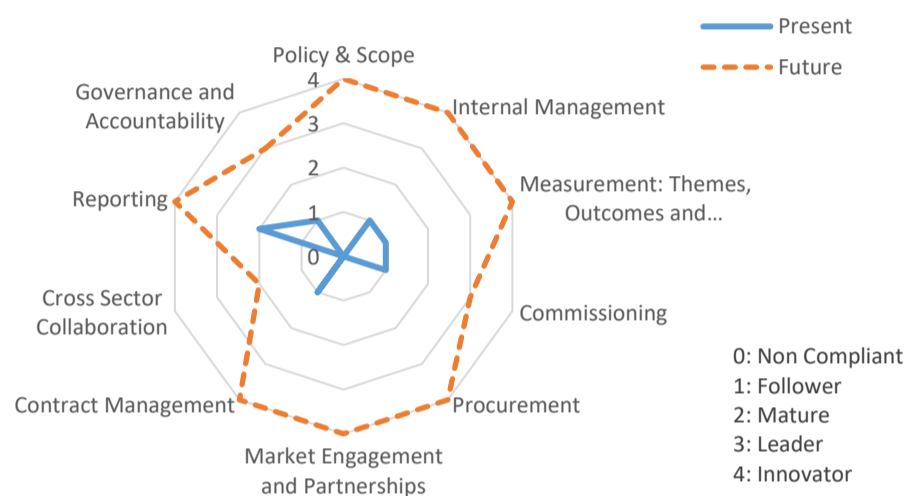
Action Plan

Organisation:

Present Performance: **Follower**

Future Target: **Innovator**

	Present	Future
A Policy & Scope	Incomplete/Non Compliant	Innovator
B Internal Management	Follower	Innovator
C Measurement: Themes, Outcomes and Measures	Follower	Innovator
D Commissioning	Follower	Leader
E Procurement	Incomplete/Non Compliant	Innovator
F Market Engagement and Partnerships	Incomplete/Non Compliant	Innovator
G Contract Management	Follower	Innovator
H Cross Sector Collaboration	Incomplete/Non Compliant	Mature
I Reporting	Mature	Innovator
J Governance and Accountability	Follower	Leader



	To reach 'Follower'	To reach 'Mature'	To reach 'Leader'	To reach 'Innovator'	Note
Policy & Scope		Develop a process to identify contracts that should include Social Value, beyond the OJEU threshold, and include in your policy. Define and justify the threshold over which Social Value is included, ensuring that it is relevant and proportional.	Ensure that your policy requires Social Value both above and below the OJEU threshold. Develop a strategy to tailor the required Social Value contribution to the size and scope of the contract. Embed Social Value into the Frameworks that fall under the Act.	Go beyond the Act and apply Social Value requirements to Grants, Supplies, Works, Services and Planning. Embed Social Value into all of your Frameworks. Develop specific policies on stakeholder involvement, materiality assessment and valuation.	
Internal Management		Appoint a Councillor or Cabinet Board member to report/lead on Social Value.	Appoint an officer to have responsibility for reporting, managing and delivering Social Value across procurement and commissioning. Implement a training programme for officers involved in Social Value, and provide resources to assist them in implementing the Social Value Strategy.	Add managing and delivering Social Value to the responsibilities of all officers.	
Measurement: TOMs		Introduce a programme to start measuring Social Value in non-financial terms, against an approved set of TOMs. Ensure that there is a Golden Thread linking your Corporate Strategy, Social Value Policy, and the TOMs used to measure Social Value. Include a requirement in your policy to ensure that your approved TOMs are available to suppliers through your website.	Start to measure Social Value in financial as well as non-financial terms, against the approved TOMs. Start a process to update TOMs annually, supported by evidence from case studies and ongoing contracts. Introduce a system to weight outcomes according to Council and local priorities.	Include processes to incorporate changes to local community priorities in the TOMs annually. Incorporate stakeholder feedback to adjust your outcome financial weightings. Consult stakeholders and public sector bodies in the TOMs development/update process (e. g. health, education, emergency services).	

Commissioning		Update the approach to Social Value through commissioning, using a needs assessment. Re-commission key projects, ensuring that Social Value creation is at their core.	Embed Social Value throughout the commissioning cycle, ensuring that Procurement are involved throughout. Introduce a process to assess new contracts before procurement has started, to understand their potential contribution to Social Value. Adjust the TOMs against your overall Social Value Strategy as it is updated. Add Social Value to guidance, resources, and templates for self service projects.	Start regular feedback between Commissioning and Procurement teams to ensure that TOMs remain 'live' and relevant. Collect data to map geospatially and measure Social Value as part of the evaluation criteria. Initiate a process to systematically update outcomes, building on stakeholder feedback.
Procurement	Ensure that Social Value is mentioned in Services related tenders. Ask tenderers to make Social Value commitments, to improve the economic, social and environmental wellbeing of the local areas.	Mention Social Value across all tenders. In tenders that fall under the Act, include Social Value requirements as part of the Quality Score. Include Social Value weighting in the Quality Score, of between 5 and 10%.	Include Social Value requirements as part of the Quality Score in all tenders. Ensure consistency in Social Value approach within departments by introducing Checks and/or Gateways. Introduce a process to incorporate feedback/lessons learnt within departments.	Include Social Value weighting in the Quality Score, of greater than 10%. Ensure consistency in Social Value approach across the organisation by introducing Checks and/or Gateways between departments. Introduce a process to incorporate feedback/lessons learnt across the organisation. Set up a space to share your Social Value Themes, Outcomes and Measures across departments.
Market Engagement and Partnerships	Initiate a Market Engagement strategy around Social Value. Set up market engagement programmes for specific projects.	Target the business community and third sector to build capacity in delivering Social Value.	Set up a regular Supplier Summit for feedback/capacity building. Collate or get access to a library of case studies and other examples of Social Value activity. Add a Market Development plan to your action plan and your policy around commissioning development. Introduce a programme for upskilling local organisations (micro/small/medium enterprise and VCS). Identify or begin a programme of regular forums for Social Value networking/engagement.	Introduce a programme of specific initiatives to build partnerships with business and the third sector. Begin specific initiatives to build partnerships between business and the third sector.
Contract Management		Bind specific, targeted Social Value action plans into contracts, and monitor the delivery of Social Value after award.	Undertake performance reviews of contracts and incorporate feedback, to ensure improvement in SV delivery. Put processes in place to incorporate lessons learnt and feedback from contract management (e. g. benchmarking).	Establish best practice across all contracts shared with other councils, through benchmarking. Introduce a quarterly feedback system to report progress to suppliers.
Cross Sector Collaboration	Implement a system for sharing data on an ad hoc basis for joint procurement/commissioning initiatives.	Identify relevant public bodies for cross sector collaboration, and begin discussions.	Develop a shared Social Value implementation plan.	Develop and share a common set of TOMs for all public sector bodies to use. Identify and share cost savings available through Social Value initiatives. Develop a common reporting method for Social Value.
Reporting			Include benchmarks and progress against targets within Annual Reporting.	Develop innovative methods of providing feedback to citizens on progress. Publish case studies and other evidence on the local impacts of Social Value policy.
Governance and Accountability		Ensure that the requirements of the Social Value Act is addressed in the Corporate Strategy. Include Social Value as a core principal, as supported by a published Social Value policy and Implementation Strategy. Publish all Social Value documentation on your website.	Identify a Cabinet Member to have direct oversight of Social Value performance. Embed Social Value into commissioning and procurement, with a ratified policy and published toolkit. Support the implementation of Social Value with an overarching Action Plan.	Consider Social Value according to the Act, and set SMART targets and accountability for meeting these targets.

** The actions in the action plan are defined by your response to each question, and show what must be done to reach your Future Target from your Current Performance for each. Please note that the column headings strictly refer to achieving the different levels for individual questions, rather than your overall performance.*