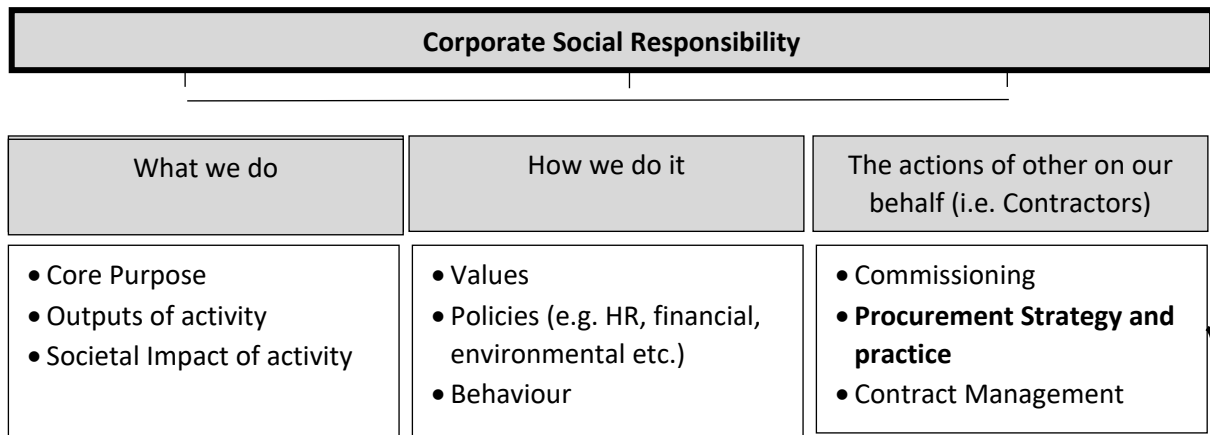
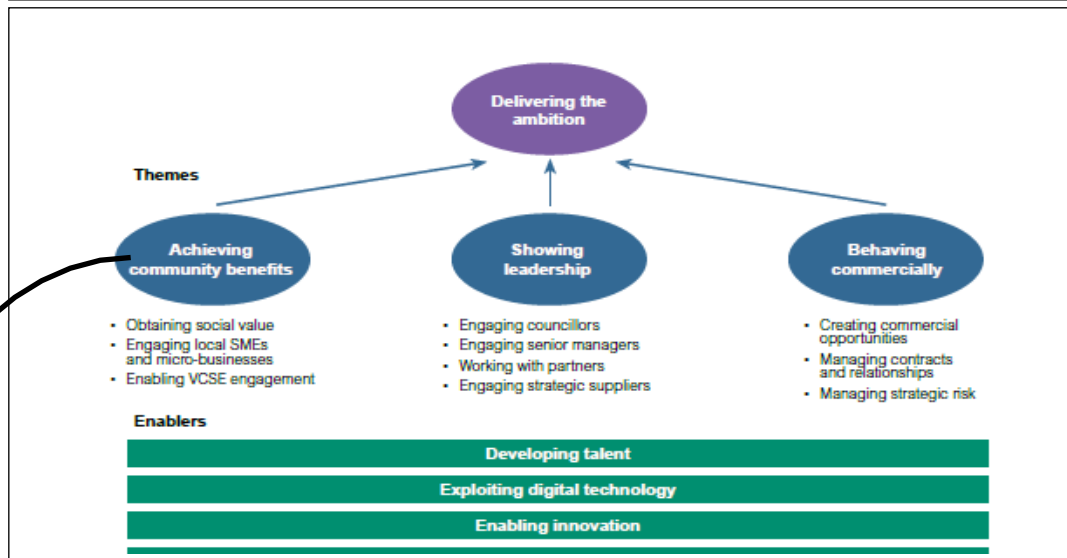


**Delivering Social Value within a Corporate Social Responsibility Framework**



**Procurement Strategy**

Sefton Procurement Strategy based on LGA National Procurement Strategy  
*Themes:* Showing Leadership; Behaving Commercially; **Achieving Community Benefit**  
*Enablers:* Developing Talent; Exploiting Digital Technology; Enabling Innovation; Embedding Change



**Social Value Action Plan**

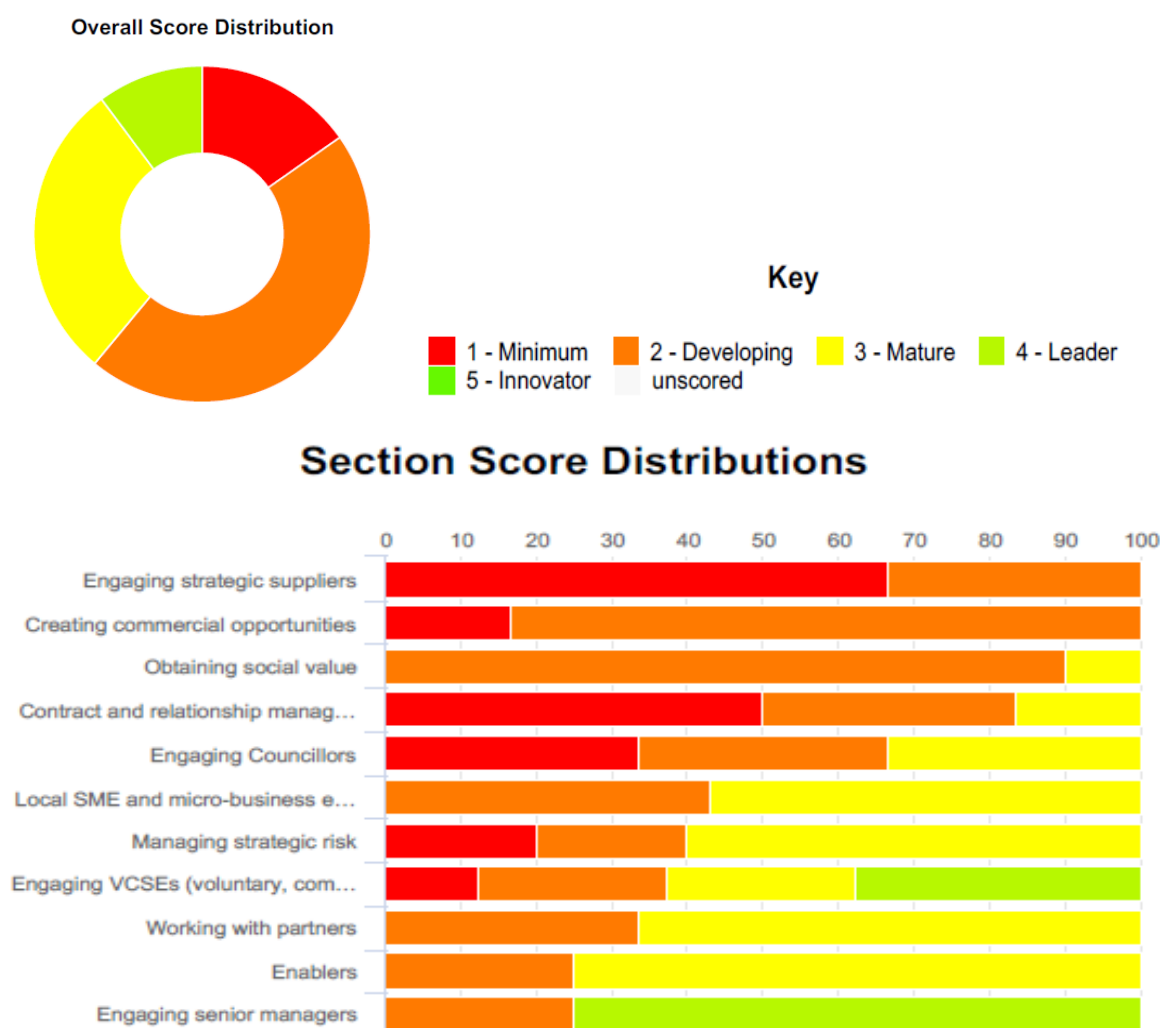
Guiding Principles:

- Catch Up with those leading the field
- Go beyond compliance with the Act
- Maximise full breadth of Social Value outcomes
- Effectively measure, monitor & report delivery

## Procurement Strategy

A Self-Assessment against the LGA National Procurement Strategy, using a LGA developed self-assessment toolkit, has been undertaken. The self-assessment involves assessing the level of maturity (Minimum, Developing, Mature, Leader, Innovator) against 59 statements across the 11 Key Areas set out in the Strategy. The purpose of the toolkit is to help councils to set objectives in relation to the maturity levels in each of the key areas and to assess their own progress against those objectives.

The self-assessment identified Sefton as “Mature”, “Leader” or “Innovator” in 23 of the 59 areas assessed; “Developing” in 28 of the 59 areas assessed; and “Minimum” in the remaining 8 areas. A summary of Sefton’s self-assessed position is shown below:



At a more detailed level, the Self-Assessment identified Sefton as:

**Leader / Innovator:** Commissioning with VCSEs; VCSE engagement measurement; Policy & Scope (VCSEs); Influence and Impact; Processes; and Senior Managers development

**Minimum:** Contract & Relationship Management skills and knowledge; Councillor development; data collection and analysis; Existing strategic supplier engagement; performance reporting; savings and benefits delivery, supplier financial distress

The above would form the basis of a specific Action Plan to further improve our Procurement practices. This would also include specific focus on Obtaining Social Value; Creating Commercial Opportunities; Engaging Strategic Suppliers; and Engaging Councillors, as areas where more than 50% of the measures assessed were categorised as Minimum or Developing.

## Social Value Action Plan

The Guiding Principles for development of our approach to Social Value have previously been shared with OSC as: Catch up with those leading the field; Go beyond compliance with the Act; Maximise full breadth of Social Value outcomes; Effectively measure, monitor & report delivery.

The self-assessment against “Obtaining Social Value” in the LGA National Strategy includes assessment against the following statements, “the extent to which...”:

- the requirements of the Social Value Act are embedded into corporate policy;
- social value awareness is embedded across all management levels;
- social value TOMs are reported and used;
- social value requirements are embedded in the commissioning process;
- social value requirements are embedded in the procurement process;
- obtaining social value is part of engagement and third-party relationships;
- social value requirements in contracts are managed;
- social value is embedded in a wider collaborative environment;
- obtaining social value is communicated and reported;
- social value is embedded and managed in the commissioning and procurement process.

These can all be addressed within the scope of the guiding principles, through specific, tangible and time-bound actions in a Procurement/Social Value Action Plan. In headline terms these might include:

	Principle	Yr1	Yr2
<b>1.</b>	<b>Catch Up with those leading the field</b>		
	<ul style="list-style-type: none"> <li>• Baseline</li> </ul>	<ul style="list-style-type: none"> <li>• Describe current position and intended direction of Travel</li> </ul>	<ul style="list-style-type: none"> <li>• Measure progress and compare again</li> </ul>
	<ul style="list-style-type: none"> <li>• Learn from others</li> </ul>	<ul style="list-style-type: none"> <li>• Set out development areas and practice to be adopted</li> </ul>	<ul style="list-style-type: none"> <li>• Measure progress and compare again</li> </ul>
<b>2.</b>	<b>Go beyond compliance with the Act</b>		
	<ul style="list-style-type: none"> <li>• Commissioning for Social Value</li> </ul>	<ul style="list-style-type: none"> <li>• Embed new Social Value approach within processes.</li> <li>• Promote and educate commissioners and market</li> </ul>	
	<ul style="list-style-type: none"> <li>• Social Value from existing providers</li> </ul>		<ul style="list-style-type: none"> <li>• Work with providers procured prior to Action Plan</li> <li>• Further work on TOMs<sup>1</sup></li> </ul>
	<ul style="list-style-type: none"> <li>• Social Value from other local businesses</li> </ul>		<ul style="list-style-type: none"> <li>• Work with and promote to local businesses</li> <li>• Further work on TOMs<sup>1</sup></li> </ul>
	<ul style="list-style-type: none"> <li>• Work with partners to maximise social value in Sefton</li> </ul>	<ul style="list-style-type: none"> <li>• Promote and encourage a common approach across public sector partners commissioning in Sefton.</li> </ul>	<ul style="list-style-type: none"> <li>• Promote and encourage a common approach across public sector partners delivering services in Sefton.</li> <li>• Further work on TOMs<sup>1</sup> with public sector partners commissioning in Sefton</li> </ul>
<b>3.</b>	<b>Maximise full breadth of Social Value outcomes</b>		

	<ul style="list-style-type: none"> <li>• Economic, Social and Environmental wellbeing</li> </ul>	<ul style="list-style-type: none"> <li>• Adopt Themes; Outcomes; &amp; Outcome Outlines from Social Value Portal National TOMS</li> </ul>	Further work on TOMs <sup>1</sup>
<b>4.</b>	<b>Effectively measure, monitor &amp; report delivery</b>		
	<ul style="list-style-type: none"> <li>• Include in Contract &amp; KPIs</li> </ul>	<ul style="list-style-type: none"> <li>• Embed providers' Social Value commitments within contractual KPIs (Outcomes &amp; Outcome Outlines)</li> </ul>	Further work on TOMs <sup>1</sup>
	<ul style="list-style-type: none"> <li>• Actively measure, monitor &amp; report</li> </ul>	<ul style="list-style-type: none"> <li>• Measure, monitor &amp; report on providers' Social Value commitments / contractual social value KPIs (Outcomes &amp; Outcome Outlines)</li> </ul>	Further work on TOMs <sup>1</sup>

<sup>1</sup> Further work on TOMs (Social Value Portal National TOMs) would include a review of the application and suitability of the Themes; Outcomes; Outcome Outlines during year 1 and further consideration of the benefits/dis-benefits of implementing more specific Measures (either from the TOMs or elsewhere).