

SCOTTISH FUTURES TRUST

Guidance: Measuring Social Value using the SFT TOMs

Developed in conjunction with the Social Value Portal

October 2020



The purpose of this document is to provide support for users of the SFT TOMs while inputting data or reviewing reports.

It includes a description of all measures within the framework against their SFT reference, by unit, definition, evidence requirement and example.

It is a live document which will be updated from time to time, based on working experience, external research and data updates. Please make sure you have the latest version. If you are unsure, please contact the designated Social Value Adviser at the Social Value Portal, whose details are included in this document.

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“Before commencing a procurement process, commissioners should think about whether the projects or services they are going to buy, or the way they are going to buy them, could secure wider social, economic and environmental benefits for their area or stakeholders.”

Executive Summary

The link between delivering construction projects and the delivery of associated community benefits has been long recognised as an important facet of the hub programme. The approach of delivering a series of predetermined community benefits, be they education or employment based has brought direct benefit to communities and has increased the focus on committing to local and Scotland based SMEs. Participants in the hub programme and their communities have benefited from the efforts of the hubCos and their Supply chains as they have commitment to the delivery of community benefits.

The Procurement Reform (Scotland) 2014 Act, formalised the requirement for suppliers appointed through Regulated Procurement actions to commit to delivering community benefits. Having now reached its tenth year of operation and having assisted in establishing community benefits as part of the construction procurement landscape across Scotland, the hub Programme Management Office (PMO) has reviewed the relevance of the current model. In the light of the increased level of experience of the five hubCos, the very clear expertise and commitment of the Tier 1 contractors and the greater level of understanding which has been developed collectively around delivering benefits to the local communities of Scotland, it is clear that there is potential to collectively achieve much more.

This review has resulted in a fundamental shift to a new model. Delivering social value is considered to be the natural successor to the original community benefit model. Social value looks at a wider suite of measures and outcomes which when implemented can deliver much more relevant benefits to local communities, whilst maintaining the important link to the (construction) contract being procured.

The model which the PMO has developed in conjunction with the [Social Value Portal](#), builds upon the [National TOMs](#) which were created for the [UK Social Value Task Force](#). The outcome of this collaboration is a set of Themes, Outcomes and Measures (the SFT TOMs) which are bespoke for the procurement of Public Sector construction projects in Scotland. This guidance document provides a context to the model, explains how the TOMs can be deployed at project level, identifies best practice options for adopting the model, and it also contains the current (April 2020) SFT TOMs.

The 48 TOMs provide Participants and the hubCos with a menu of measures which can be selected from at the outset of a project. This range of measures enable the focus and energy associated in the creation and delivery of social value to be directed towards the specific needs of individual localities or groups of people, resulting in the creation of real and relevant social value. Success is however dependent upon the focus and commitment of the partners in the project. The model provides the tool with which to structure and measure a project's social value ambition and outputs. It is, however, the commitment primarily of the Participant, the hubCos and the Tier 1 contractors that will shape and deliver real societal benefit.

By incorporating a monetisation mechanism, the TOMs enable the social value targeted and delivered to be quantified in a universally understood metric (£s). This provides users with a means of reporting the social value of a project in a manner which is understood by all. Many of the proxy values used to monetise the social value outputs have their roots in the Unit Cost Database (UCD) that was developed for the UK Government and which follows the principles laid out by HM Treasury for monetising economic, environmental and social impact. Where the UCD does not have an appropriate proxy, then these have been developed following relevant governmental guidance.

The SFT TOMs are cross referenced to the [National Performance Framework](#) and the [United Nations Sustainable Development Goals](#), enabling the contribution of projects and the wider programme to these national objectives to be identified. This simple, yet effective linkage simplifies both the internal and external reporting requirements of Participants, hubCos and Tier 1 contractors.

The project information will be hosted on SVP's portal and all parties will have access to their live and completed projects. This approach, combined with the functionality of the portal, facilitates simplified data recording and reporting. A series of dashboards has been developed at project, Territory and programme level, with access rights being granted as appropriate.

A new model requires a new approach to defining and securing social value requirements. The ITT process outlined within the guidance proposes an interim solution which will assist in securing the optimum level of social value, without burdening the Tier 1 contractors and their supply chain. Understanding what an appropriate level of social value is to target on an individual project level is to an extent unknown. However, by working collectively over the next 12-18 months, it will be better understood how to calibrate the social value targets at individual project level.

It is expected that the TOMs and the content of this guidance document will continue to evolve, this process of managed change which will keep the model live and relevant will be managed by the Social Value Working Group which will initially be chaired by the hub PMO.

Introduction

This guidance is designed specifically to assist the hub Participants, the hubCos and their supply chain partners), in developing, defining managing and delivering their social value returns using the SFT Themes Outcomes and Measures (TOMs) and the Social Value Portal.

[The Procurement Reform \(Scotland\) 2014 Act](#) (The Act) requires public sector organisations to incorporate a requirement for suppliers to deliver community benefits when procuring services via a Regulated procurement action. These community benefits should relate to –

- (i) Training and recruitment;
- (ii) Availability of sub- contracting opportunities; or which
- (iii) Improve the economic or environmental well-being in the procuring Authority’s area, in a way which is additional to the main purpose of the contracting which the requirement is included.

The current suite of Community Benefits which is integrated into the hub programme has delivered many positive outcomes and meets the current requirements of The Act. However, there is now an opportunity to take advantage of the increased awareness of the Construction Industry of the importance of supporting local communities when developing social infrastructure projects, to enable capabilities which have developed within the sector to be optimised and to deliver a more comprehensive set of benefits to communities. All of which can be achieved without placing additional burden upon the Tier 1 Contractors and their Supply Chains.

By introducing the SFT Social Value model, which is based upon the National TOMs, a robust framework which identifies a broad range of benefits which can be delivered on each project within the hub programme is being provided. The model enables high priority social value targets to be established, the delivery of social value to be tracked and managed and by adopting a tested and auditable monetisation approach the £ Social Value delivered can be measured. By capturing

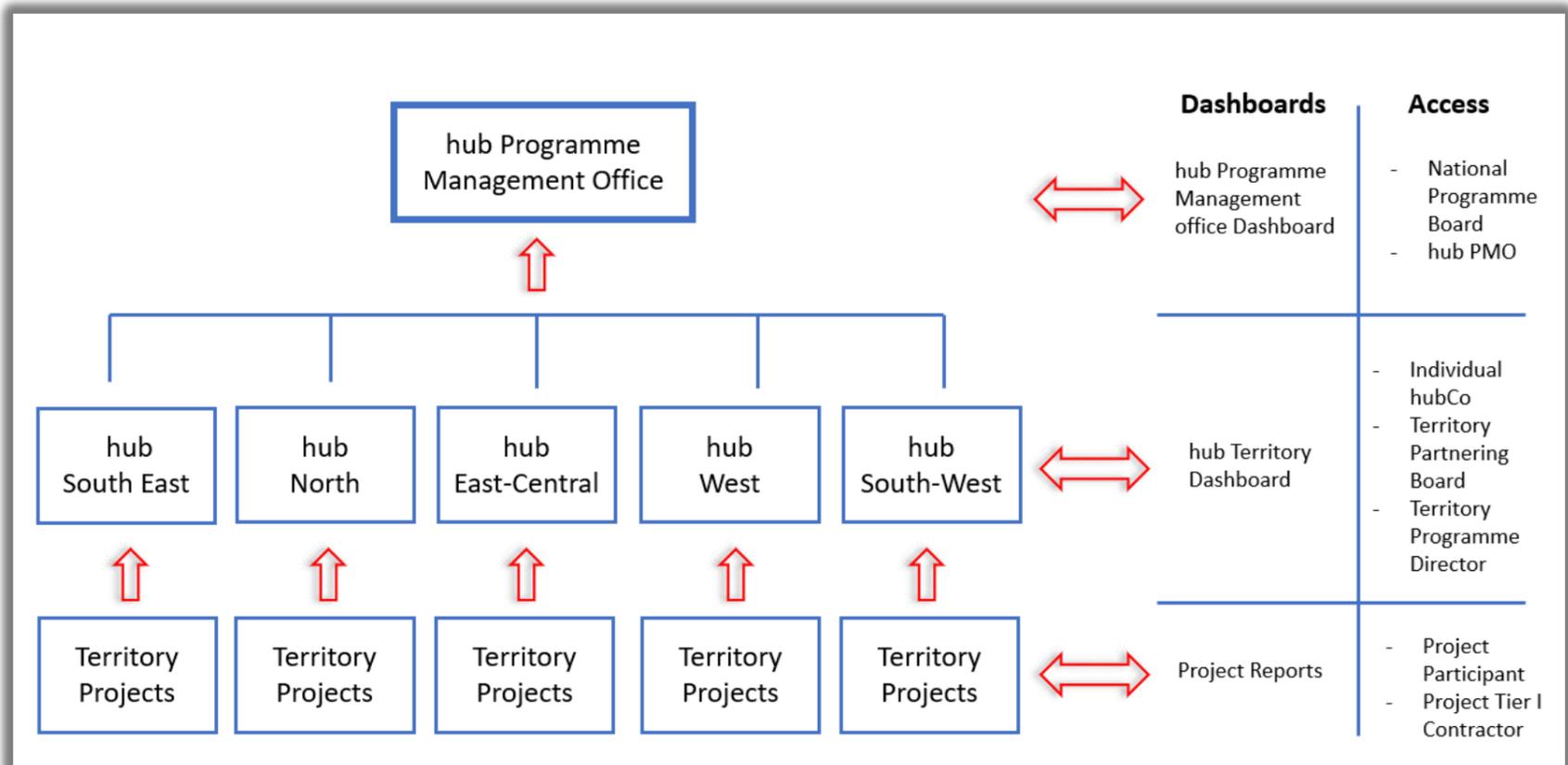
and quantifying the Social Value delivered across the programme of projects in a standardised model which links to the National Performance Framework and the UN Sustainable Development Goals, the outcomes of the endeavours of those delivering projects can be clearly seen and the benefits (using monetised proxy values) can be understood by all parties.

The SFT TOMs is based on the National TOMs, the standardised measurement framework developed by the Social Value Portal and the Social Value Taskforce, endorsed by Local Government Association. It builds on the experience developed by the hub programme to date, in delivering and reporting on community benefits. It is intended that the Social Value model will with effect from April 2020, superseding the previous community benefits approach, being adopted on all new Qualifying Projects. A series of projects which are currently in development will be transitioned to the new model. In the fullness of time, this will be the sole means of measuring of benefits to communities/society across the hub programme.

HubCos and supply chain partners will need to provide data in order to complete a periodic Social Value Return based on the TOMs. Data will be input directly to the Portal by designated users, who will be granted a licence to use the Portal for this purpose.

This guidance and methodology will ensure that Scotland’s five hubCos are reporting social value to a consistent standard and are better supported in delivering and reporting on social value.

The purpose of the data input at the project level is to record the social value which is being targeted and delivered. This will enable progress to be managed and regular and robust reporting to be facilitated. Individual project data will be combined with data from other projects within the hub Territory to produce a Territory wide report for the hubco. The data from the 5 hubCos will be combined to produce a programme report for the hub Programme Management Office (PMO) within Scottish Futures Trust.



Data will be regularly input by the Tier 1 contractor which is delivering each project. This information which will include supporting evidence, will then be validated by the responsible person within the relevant hubco. This validation will enable reports to be updated at a hubco level and hub PMO levels, these reports being essential for project and programme management purposes. Participants will also have direct access to the reports associated with their projects.

The SFT TOMs and the National TOMs

Themes, Outcomes and Measures

The guiding principle behind a Themes, Outcomes and Measures (“TOMs”) framework is to provide a clear connection between high level objectives (“Themes”) and specific, measurable actions that another party can understand and deliver against. This process offers a clear logic for action and a transparent way of

understanding the proportionality or level of impact that these actions can deliver, relative to the high-level themes. Outcomes provide the connection between the Themes and Measures and are a way of articulating how the Themes, which are framed in very general terms, are relevant to an organisation.

This is illustrated in the example diagram below.

Theme	Outcome	Measures	Units	Value
Fair Work	More local people in local work	No. local people employed	No. people	£28,758.00/FTE
Entrepreneurial, Inclusive and Sustainable Economy	More opportunities for local SMEs and VCSEs	£ invested with third sector	£ invested	£1/investment
Inclusive, Empowered, Resilient Communities	Vulnerable people better supported	No. voluntary hours	No. hrs	£16.07
Protecting and Enhancing the Environment	Reduced carbon emissions	Reduced CO2e	tCO2e	£69.35
Social Innovation	Social Innovation	Social Innovation	No. hours/£	£1/investment

Total Social Value = Sum (Measures*Value)

The Hub TOMs and the National TOMs

The National TOMs was developed by the Social Value Taskforce, a group of local authorities, central government representatives and private businesses, whose aim was to agree a standardised social value measurement framework that was robust and transparent, yet relatively easy to use “off the shelf” and accompanied by all the necessary [guidance](#) the first edition was launched in November 2017

SFT has worked with the Social Value Portal to develop a measurement framework that is suitable for the requirements of the hub programme, which is based on the National TOMs, but also builds upon the legacy of community benefits established in the hub programme. Importantly, the model is also aligned with the Scottish Government’s National Performance Framework (NPF). The outcome of this work is a bespoke model which adopts the National TOMs methodology and includes a number of additional measures which reflect the priorities and guidance of the

Scottish Government. The hub TOMs are structured thematically to reflect the NPF, facilitating reporting against these criteria

The hub TOMs, the National Performance Framework (NPF) and the United Nations Sustainable Development Goals (SDGs)

The Global Goals have been adopted by Scottish Government and 193 world leaders at the 2015 UN’s annual General Assembly. The 17 Goals aim to create a better world by 2030, and catalyse global action to end poverty, fight inequality and stop climate change. They require the active participation of all sectors of society: governments, businesses, civil society and the general public. There is clear alignment between the sustainability agenda promoted by the NPF, the Global Goals and that the SFT TOMs Framework.



Organisations delivering social value through the SFT TOMs are very likely to be contributing to the NPF and the Global Goals agenda. Their interconnection provides the power to mobilise resources, connect organisations across sectors, and empower communities to take ownership of their needs. The SFT TOMS cross reference to the NPF and the UN SDGs, enabling users to understand how different measures contribute to specific Goals

Local Value and Social Value

The TOMs methodology is based on principles of socio-economic cost-benefit analysis and is designed to be consistent with the [Treasury Green Book](#). As such, it recognises the importance of the economic benefit that business expenditure locally creates.

It is important to note, however, that there are two distinctive components of this framework:

- “Local” value, which reflects economic benefits created in local areas through employment of local people and expenditure with local businesses, but without adjusting for the social impact of this expenditure (measures: SFT1, SFT28); and
- “Social” value, which is covered by most of the other measures apart from the environmental measures

There are three important considerations in relation to the way “local” and “social” are used in the TOMs framework.

Defining Local

Please note that “local” is defined differently according to the measure in question. For employment (SFT1), “local” is defined as being within the boundary of the local authority in question. For supply chain expenditure, “local” is generally defined as being within the hub Territory area, there are however Territory specific variations of this definition. In the instance of Health Boards, local is defined as being relative to the location (Local Authority area) of the project which is being delivered.

Reporting

For reporting purposes, these elements need to be considered separately, because while “local” value is beneficial to that particular area, it cannot be treated as having this value to society or to the country overall. This is because, in order to be consistent with principles of economic appraisal, we have to eliminate the risk of “displacement”, which means the idea that if a job is created for someone in one area or a contractor is employed in that area, there is a presumption that this is displacing a potential job or contract in another. Consequently, the “local” element itself is not seen as creating value when viewed from an overall societal perspective.

In practice, it is recognised that generating economic benefits that are “local” in relation to the project in question is likely to be positive for a number of reasons, but this qualitative benefit is not picked up in the TOMs measures themselves, which are simply a record of economic activity. So, in order to ensure methodological consistency, “local” and “social” value measures will be reported separately.

Relative value

It will be noted that the £ values generated by reporting local jobs and local supply chain spend will tend to significantly exceed the £ values generated by other measures in the TOMs framework. The jobs and local supply chain spend figures, while important indicators, are not directly comparable with other measures. Other than for specific project reasons (e.g. the remoteness of the project location making identification of local supply chain partners difficult), it is expected that there should always be a certain amount of local content, because this makes good business sense. Other measures (for example, making opportunities available to people furthest away from the jobs market), require greater effort and investment. In a sense, “local” value is relatively passive because a substantial amount would have happened anyway, while other measures can be considered to be more “active” contributions to social value.

This is another reason for separating out “local” value indicators. As a matter of principle, all projects should report on more measures than just the “local” indicators and should be aiming for a spread of reported measures across the themes. This approach is reflected in the target-setting, which is discussed in more detail in the section below.

Double Counting – jobs and local supply chain spend

You may count local jobs in the supply chain as well as those people directly employed by the Tier 1 contractor on the project. However, if you decide to do this, you must recognise the fact that a proportion of the expenditure with your supply chain will be funding these jobs and that therefore there is a risk of double count. In order to avoid this, you should deduct the aggregate estimated value of the salaries as a component of the supply chain spend (SFT 28) and input the net amount against SFT 28. You may then input the number of jobs (as annualised FTEs) relating to that supply chain spend against SFT 1.

Targets

The transition from measuring Community Benefits to Social Value.

As of April 2020, all projects procured through the hub Programme will adopt the SFT Social Value model (The SFT TOMs). In recognition that at this early stage of adoption, there is not a clear indication of the level of social value which will typically be generated on project, the following interim approach to setting social value targets at the ITT stage of a project is proposed. In the fullness of time, when it is more fully understood how to calibrate social value targets, an amended approach to setting targets will be developed.

The medium-term intent is that the Community Benefit KPIs in all Territories will be superseded by a target social value (£/%). This change will be implemented when there is sufficient evidence to demonstrate what constitutes good SV performance across a range of project values.

Interim Target Setting/Invitation to Tender approach

The SFT TOMs identify 48 Measures which are associated with the 5 Themes. The intention is that these measures should be used as a menu from which Participants can identify their priorities for the social value focus of the projects which they are commissioning. There is not a requirement for a contract to adopt all of the measures identified within the TOMs, this would place an unreasonable burden upon a Tier 1 Contractor and its Supply Chain.

Accordingly, agreeing the priorities with the Participant during the development of the New Project Request is of fundamental importance. It is expected that the hubCo's Social Value Manager will meet with the relevant Participant officers at an early stage, to identify these priorities. Previously, when using the Community Benefits model, these discussions typically took place with the Participant's Development teams rather than with the Officers with community, employability or education responsibilities. This was a satisfactory approach as the delivery of Community Benefits was to an extent formulaic, being predicated by the hubco KPIs.

The SFT TOMs are wider ranging and offer a greater opportunity to focus upon the specific requirements of communities in the commissioning Local Authority areas. Consequently, the discussions between the hubco Social Value Manager and the relevant parties within the Authority are critical in setting the social value ambition of the project.

It is important that the areas of social value focus are related to the services which the Tier 1 contractor is delivering and expectations during the early stages of adoption, will likely need to be managed.

Whilst targets should be ambitious, they must also be realistic and deliverable. Well informed scoping will ensure that this balance between ambition, relevance, proportionality and deliverability is met.

It is anticipated that the Participants will have relationships with Voluntary Community Social Enterprises (VCSEs), Third Sector Organisations (TSOs) and agencies which can provide links to specific groups within the community. The social value scoping work should identify which of these organisations can provide tendering Contractors with an understanding of the needs of these groups and how best to engage with them.

It is proposed that during this early stage of adoption of the SFT TOMs that the following approach is adopted when establishing the initial targets –

1. The existing hubco KPIs relating to Community Benefits and environmental performance should be calculated for the project and mapped onto the SFT TOMs matrix. These are defined as **Specified Requirements**;
2. The CITB Client Based Approach matrices which identify calibrated employment and training targets based upon contract value should be referenced to set minimum targets for these measures. Again, these targets should be mapped onto the SFT TOMs matrix and are also **Specified Requirements**; and
3. Through liaison with the procuring Participant, further specific SV targets should be identified, the matrix again being populated with these are **Supplementary Requirements**;
4. The Matrix should also identify **Additional Supplementary Requirements**, these being measures offered by tendering Contractors which can bring additional added value to their bid. To ensure that these Additional Supplementary Requirements (if offered) are relevant, the SV matrix should be annotated to identify measures which whilst not mandated, are considered to be of value to the Participant.
5. The Matrix should identify measures which have capped targets - i.e. when the Participant considers that there is no additional value in being offered a greater amount of a particular measure e.g. school visits. This will make clear to tenderers that offering Additional Supplementary Requirements in respect of these capped measures, will not secure additional points in the tender evaluation process (see later section).

The social value matrix issued with the Invitation to Tender (ITT) documentation should be annotated with the Specified, Supplementary and Additional Supplementary Requirements. It should also clearly identify the capped measures. The appropriate proxy values should also be incorporated within the matrix, enabling all parties to understand the £ value of social value which is required to be delivered.

The tender returns should require the matrix to be populated with the Tier 1 contractors' proposals with the Additional Supplementary Requirements being clearly identified. This document should be supplemented by a comprehensive set of method statements which identify, with the support of examples how the measures will be delivered.

At this early stage of adopting the model it is unclear of the £ social value that will be delivered on individual projects. This is particularly the case as Social and Local economic value are now identified separately. The Working Group will compare performance across live projects and in conjunction with the Social Value Portal benchmarks will in the fullness of time, develop social Value benchmarks for targeting purposes.

ITT Documentation

Adopting the above approach enables the social value matrix to clearly set out the Participant's social value requirements. By incorporating the matrix and appropriate supporting text within the ITT documentation, the tendering Tier 1 contractors/Design Teams will be clearly informed of the minimum Social Value expectation which they are required to deliver.

In implementing the social value model, the intention is to enable the Tier 1 contractors to deliver increased levels of social value, but without placing additional burden upon their organisations. Whilst it is anticipated that the Specified measures will be met and probably exceeded by the tenderers, it is not certain what the response to the Supplementary and Additional Supplementary Requirements will be. Consequently, an evaluation model needs to be established in each Territory for inclusion within the ITT documentation, to assist in the transparent and proportional evaluation of the social value proposal from each of the tenderers.

The social value component of the ITT evaluation should form part of the qualitative evaluation (as opposed to quantitative), this approach minimises the risk associated with non-delivery of proposed SV (see later) and also enables the ITT evaluators to consider the method statements associated with the delivery of the SV targets. This approach enables an objective evaluation of the likelihood of the proposed targets being delivered to be undertaken.

In terms of allocating evaluation points within the overall ITT scoring scheme, this should be agreed with the procuring Participant. As a guide it is generally recommended that social value is allocated a minimum of 10% of the quality evaluation total (see SFT Toolkit). The hub Programme has always prioritised best value as the criteria for appointing project partners and the attribution of a significant proportion of the qualitative score to the social value commitment is promoted by the hub Programme Management Office (PMO).

Incentivising Delivery of Social Value Commitments

The transition to the Social Value approach is not expected to increase the burden upon the supply chain. There is however a case for a mechanism which encourages performance and in the event of underperformance, provides Participants with appropriate and equitable recourse. It is proposed that this could be addressed by adopting the following procedure –

¹ The Authority may categorise the various Social Value measures and identify a specified value to be deducted should these not be provided. In which case a series of clauses should be developed for each value category. Alternatively, the Authority may replicate the clause above for each Social Value measure to be provided.

1. At a hubco level, under-delivery of the Specified Requirements which are included within the KPIs of each hubco will be subject to management via the mechanisms contained within the Territory Partnering Agreement;
2. Under delivery of the training and education targets (Specified Requirements) derived from the CITB Client based Approach (whether or not included within the hubco KPIs) should in accordance with the [SFT Community Benefits toolkit](#), be subject to deductions which are included within the Design Build Development Agreement (DBDA) between hubCo and the Participant and the Design and Construct contract which sits between the hubco and the Tier 1 contractor (see recommended drafting below).
3. Under-delivery of the Supplementary Requirements or Additional Supplementary Requirements will be subject to deduction of pre agreed amounts included within the Design and Construct contract, which sits between the hubco and the Tier 1 contractor. Alternatively, and at the Participant's discretion, the Tier 1 (and their Supply chain) may offer to provide equivalent social value by delivering against other measures contained within the SFT TOMs.

The amount of deduction associated with the non-delivery of a particular measure should be linked to the cost of providing the Specified, Supplementary or Additional Supplementary Requirements, rather than the social value generated by their delivery.

It is important to note that whilst there is mechanism to compensate for under-delivery of agreed SV targets within each project, at this early stage in the adoption of the SFT TOMs, the performance obligations of the hubCos as defined within the Territory Partnering Agreement remain unchanged – i.e. their performance will be measured against the currently agreed set of KPIs. However, it is anticipated that once an understanding of the SV model is better understood, the KPI related commitment will be replaced by a requirement to deliver a minimum level of social value.

The following drafting is recommended for inclusion within the DBDA/DBFM Contracts, with appropriate drafting also being incorporated within the design and construct contract between hubCo and the Tier 1 Contractor -

SOCIAL VALUE

hubCo shall comply with the Authority's Social Value Requirements set out in this Clause [] in accordance hubCo's Social Value Method Statement set out in Schedule Part [] (*Social Value Method Statement*) in respect of the Works and Services.

If Project Co, in relation to the Works and prior to the Operational Term, does not:

- (i) directly provide each of the Authority's Social Value Requirements¹ as set out in Schedule Part [], then then hubCo shall pay to the Authority the sum of [£] per measure not so provided; or(ii) at the Authority's discretion, hubCo has not provided alternative Social Value measures to the Authority which have an equivalent to the Social Value² measures identified within Clause [] but not provided.

² The defined Terms in the contracts will require amendment to incorporate social value terminology

provided that, in each case, the Authority has first served a notice on hubCo Co notifying it of its non-compliance with this Clause [] and hubCo has failed to rectify that non-compliance within 20 Business Days of such notice.

All payments due by hubCo to the Authority under this Clause shall be payable within 10 Business days of written demand.

Best Practice (“dos and don’ts”)

Submitting good data

This guidance is provided to ensure social value reports meet consistently high standards. It is important that suppliers are confident in the robustness of the data reported and, in their ability to deliver their social value commitments. Participants will contractualise these commitments with hubCo, who in turn will pass down many of these obligations to the supply chain.

At project level, the implementation of the Social Value model requires the appointed Tier 1 Contractors and Supply Chain members to submit a Social Value proposal as part of the invitation to tender (ITT) process. This process is detailed in section ?? of this guidance. Once appointed the Tier 1 contractor will be required to submit data via the portal to enable the social value generated to be measured, collated and analysed. Consequently, the quality of that information is important, and to assist in submitting high quality data, the following clarifications are provided.



Do account for employment accurately

The number of local people employed on a contract is measured as full-time annual equivalent (FTE). This allows for comparison of full-time and part-time employees, as well as contract durations of less than one year.

Quick reference:

Full time for 1 year 1 FTE

Full time for 6 months 0.5 FTE

Full time for 3 months 0.25 FTE

Full time for 1 month 0.083 FTE

Full time for 1 Week*1 0.022 FTE (Note: *1 - assumes 6 weeks of holiday)

Part time for 1 year 0.5 FTE

Part time for 6 months 0.25 FTE



Make sure you deliver locally

The definition of ‘local’ to this contract for purposes of employment (SFT 1,2 and 3) has been set as being within the Boundary of the Local Authority within which the project is located. Local when used in association with expenditure committed to SME’s (SFT 28), is defined as being within the respective hubCo’s Territory

Boundary (or in accordance with any existing Territory definition of local) for supply chain spend and for jobs. The West hubCo’s definition of local is in this instance extended to the greater Glasgow region.

Any Social Value offer that does not benefit the communities within these definitions will be excluded in the evaluation. Respondents must not include in their proposals elements of spend which are expected to occur outside this definition (e.g. central overheads / head office costs where the head office is outside the defined local area).

In recording the level of local spend, individuals must only include spend that occur as a result of this contract.



Make sure you only include local spend in your supply chain for this project

In recording the level of local spend, individuals must only include spend that occurs as a result of this contract.

Remember that your social value offer will be contractualised. Therefore, any offer to include local companies in your supply chain must not include estimates of local spend which are outside of your direct control.



Provide good evidence of how you will deliver your social value offers

When making your social value offers you need to upload evidence on to the Social Value Portal about how you are going to deliver your social value commitments. See examples in table below. When inputting data on the Portal, you will see a free-form text box against each measure. This should never be left blank – there should always be some description to support the numbers that have been input. There is a space limit in the box but there is the facility to upload additional supporting documentation – e.g. as a PDF document.



Do consider if your intervention might be a partial contribution

An identified social value activity / intervention might only be a partial contributor to an outcome if:

- i. There have been other interventions
- ii. An investment has been made in partnership with another organisation(s)
- iii. The activities are part of a larger initiative

In these cases, one should include only a percentage of the value that can be directly linked to the contract.



Do not double count!

Each social value offer made may be claimed once only.

Examples:

- If you are recording jobs provided by the project through the supply chain, you must make sure that the value of these jobs is deducted from the reported local supply chain spend figure. This is explained in more detail in the “Local Value and Social Value” section below.
- If a reduction in CO₂ emissions is proposed through implementing a flexible working initiative, one may not claim the same reduction in emissions achieved through a different initiative.
- If £ spent are claimed under the ‘Spend in the local supply chain’ measure, that £ value cannot also be claimed under the ‘Spend with local SMEs’ measure.
- If hours volunteering in the local community are claimed, these same hours cannot also be claimed under hours volunteering to improve green infrastructure.



Do not offer anything required by the core contract as social value

Services or works that the bidder is required to provide as part of the core contract requirements cannot also be counted as social value. Social value is about ‘additionality’, i.e. what will you provide over and above the core contract

Example: If the contract is about supporting people back to work, you cannot claim social value for getting people back to work as that is part of the requirement of the core contract; or

If the contract includes the construction of a community centre, you cannot treat the provision of the end service as social value.



Do not report activities that are not delivered as a result of this contract

Ensure that your target social value numbers are relevant to this contract, only, and do not stem from any other social value, Corporate Social Responsibility or other initiative.

Example: If a Tier 1 contractor organises a mental health and wellbeing activity at its head office, you cannot claim social value for this as it has not been delivered specifically for this particular contract.

However, as the 5 hubCos have been established to specifically support Participants within their Territories, the initiatives which they undertake can be attributed to individual projects within their Territory programme. An example being the hub West “Winter warmer” initiative in support of [PEEK](#) (a children’s charity). In this instance it would have been appropriate that the social or local economic benefits generated were allocated across projects being delivered within the Territory or the area of operation of the charity.

The Social Value Working Group – Accelerating Implementation, Keeping the Measures Relevant and knowledge sharing

With the adoption and implementation of the Social Value approach across the hub programme, it is anticipated that it will take some time for users to become familiar with the processes associated with the model and with the interpretation of the TOMs. Recognising that implementation and familiarity with the model can be accelerated by sharing experiences, the Working Group which developed the hub TOMs is being extended.

The Working Group which will meet quarterly, will provide the forum to discuss experiences, challenges and lessons learnt as projects are committed to the SV model. It is anticipated that the Working Group will develop best practice guidance, identify and share best practice through case studies. To assist in the sharing of knowledge, SVP will be maintaining a FAQ page on the portal which will be accessible to all hub programme users. The Working Group, which will initially be chaired by the hub PMO, will comprise representatives from each of the 5 hubCos, Social Value Portal and a representative of the group of Tier 1 contractor partners, which operate within the programme.

Once the transition the SV model has been completed and users are comfortable working with the TOMs and implementing the associated processes, the Working Group will focus upon the maintaining the relevance of the TOMs. It will support the development of new measures, many of which may be specific to the Scottish market, ensure that the TOMs reflect best practice and continue to be appropriate to assist in delivering the requirements of the programme Participants. The Group will also share knowledge gained at operational level, with the objective of supporting the wider user community and maintaining a sector leading approach, which will directly benefit the Participants which use the hub Programme.

Glossary of terms

Acronym	Definition	Comments
TOMs	Themes, Outcomes and Measures	
FTE	Full Time Equivalent	FTE is used for all employment measures (e.g. HT1, 3, 4, 5, 6.) In the response, make sure you enter the FTE per ONE year
VCSE	Voluntary, Charity and Social Enterprise	In this document, VCSE and TSO are used to define the same organisations. Please, consider these acronyms equal in that context.
TSO	Third Sector Organisation	
MSME	Small and Medium Enterprises	In this document, MSME and SME are used to define the same organisations. Please, consider these acronyms equal in that context.

National Performance Framework Key With cross references used in the SFT TOMs

A. We have a globally competitive, entrepreneurial, inclusive and sustainable economy	B. We are open, connected and make a positive contribution internationally	C. We tackle poverty by sharing opportunities, wealth and power more equally	D. We live in communities that are inclusive, empowered, resilient and safe	E. We grow up loved, safe and respected so that we realise our full potential	F. We are well educated, skilled and able to contribute to society	G. We have thriving and innovative businesses, with quality jobs and fair work for everyone	H. We are healthy and active	I. We value, enjoy, protect and enhance our environment	J. We are creative and our vibrant and diverse cultures are expressed and enjoyed widely	K. We respect, protect and fulfil human rights and live free from discrimination
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SFT TOMs Full Guidance: Measures, Definition and Guidance, Evidence Requirements

Outcomes	SFT Ref	NPF Ref	Measures	Unit	Definition and Guidance	Evidence Requirements	Example (SV responses on the portal)
Fair Work							
More local people in employment	SFT1 (NT1)	G	No. of local people (FTE) employed on contract for one year or the whole duration of the contract, whichever is shorter.	No. of people FTE	<p>The full-time annual equivalent (FTE) number of people employed on the project residing in the local area whose employment contract duration is at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract).</p> <p>The measure is any jobs which are taken by local people through the contract. These do not have to be new jobs, eg a site manager already in full time employment with the Tier 1, who is locally based may be working on this project, this would count as local employment..</p> <p>There is no minimum employment period for this measure, however, unit is no. people FTE, as such if a supply chain member employed 1 local person on the project, full-time, for 3 months enter 0.25 on the portal.</p> <p>Calculating time spent on a project in 'FTE':</p> <ul style="list-style-type: none"> - Full time for 1 year 1 - 6 Months 0.5 - 3 Months 0.25 - 1 Months 0.083 - 1 Week 0.022 <p>Local in respect of this Measure is defined as being within the Boundary of the procuring Local Authority.</p> <p>If deployed, Access (site control) System can be used to collect/evidence this. Please take care to ensure that recorded information is GDPR compliant.</p> <p>Avoid double counting with SFT29/30 (SMEs). See Example.</p>	Specify the number of qualifying employees directly employed on this contract (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first three digits only of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).	<ul style="list-style-type: none"> • FTE examples <ul style="list-style-type: none"> o If you have employed 10 local people on contract (9 working Full Time for the whole year and 1 working only part time), please enter 9.5 onto the portal (Full Time Equivalent -FTE- for a year). o 9 Full Time employee for a year on contract = 9 FTE, input 9 on the portal. o 1 Part Time employee for a year on contract = 0.5 FTE, input 0.5 on the portal. • Local example <ul style="list-style-type: none"> o Construction Director who lives in Bearsden, working on a project within the East Dunbartonshire LA boundary. • Double counting with local spend – SFT29/30 <ul style="list-style-type: none"> o No double counting with SFT29/30 (SMEs) . Portal doesn't enable SFT1 value to be automatically deducted from SFT 29/30. o To avoid double counting, if the information regarding people FTE is readily available, deduct the corresponding change (in SFT1's proxy value) from SFT29/30. o For example, you have spent £500,000 through contracts with MSMEs and this includes 2 FTE employees. <ul style="list-style-type: none"> - In SFT1 enter 2. - In SFT30 enter 500,000 <p>-(2*Localised NT1 value) = x</p>
More local people in employment	SFT1a (NT1c)	G	No. of local people (FTE) on contract for one year or the whole duration of the contract, whichever is shorter, employed through the supply chain as a result of your procurement requirements	No. of people FTE	<p>The full time annual equivalent (FTE) number of people employed on the contract by the supply chain as a result of your procurement requirements. Employees included should be residing in the local area and with an employment contract duration of at least one year, unless the overall duration of the contract is less (in which case it is at least the overall duration of the contract). Please refer to the definition of 'local area' provided for the specific contract. Please check evidence requirements for details on postcode collection. If data is imputed for either NT1b or NT1c and any of the following measures: NT18, NT18a, NT19, NT19a then only the values imputed for the latter NT measures are counted for calculating the total local economic value contribution. This prevents GVA related double counting.</p>	Specify the number of qualifying employees on this contract, (for details on what a qualifying employee is defined as, please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status (e.g. full time or part time); 3.) the Full-Time Equivalent (FTE); 4.) the first three digits only of their home postcode (i.e. the postcode district). For example, Employee 1: 6 months; full-time; 0.5 FTE; SE1. Information provided should be made compliant with data protection requirements (GDPR).	As above but only include supply chain local people employed.

More local people in employment	SFT2 (NT2)	G	% of local people employed on contract (FTE)	%	This is the percentage of people employed on the contract that reside within the local area over the overall number of people employed on the contract. Please refer to the definition of local area provided above for NT1.	Specify the total number of people employed on this contract and the total number of local people employed on this contract. Information provided should be made compliant with data protection requirements (GDPR).	Total no. of local people employed / Total no. of people employed (enter the % onto the portal)
More local people in employment	SFT3	G	Local jobs advertised	no. advertisements	The number of employment opportunities advertised either directly by the Tier 1 Contractor of the project supply chain or via the local Employability Agencies, throughout the duration of the project. This includes all channels ie job centres, employability agencies, partnerships, national organisations (ie if an employment agency has specifically targeted the local area), social media (if specifically targeted at the local area) Record only measure which is intended to highlight opportunities generated for local people.	Evidence of advertised opportunities.	Enter the number of advertisements.
More local people in employment	SFT4 (RE3)	G	Employer's fairs held to encourage local employment in the area	£ invested including staff time	An employer's fair is designed to showcase potential new jobs to local people. The fair should be organised in conjunction with an employment partner such as the local authority. This includes fairs supported along with other organisations (record as appropriate) and can be tied into other local fairs already happening. This is an event which focuses upon available job opportunities relative to the project being delivered and should be facilitated by the Tier 1 Contractor. The fair should include as many parts of the supply chain as appropriate for the stage of the development. Such events are appropriate during construction and in-use phase. The event should be held in a place that local people can access, there should be suitable notification of the event to the local community via relevant communication channels such as social media and the local press, and it should last around 4 hours. Useful links https://www.jobmonkey.com/jobfairs/career-events/ https://www.founders4schools.org.uk/educators/careers-fair/ Please note: this is a separate measure to SFT27 Meet the Buyer event.	Provide a breakdown of the costs incurred for each employer's fair held to encourage local employment. Provide details of each employer's fair, e.g. place, time and number of attendees.	Enter the £ invested in employer's fairs event held in the local area (e.g. the cost to host an employment fair including hours spent, material, hiring space, etc.)
More opportunities for disadvantaged people	SFT5 (NT3)	C	No. of employees (FTE) taken on who are long term unemployed (unemployed for a year or longer)	No. of people FTE	The number of full-time annual equivalent (FTE) employees taken on as a result of the contract that had been claiming Jobseeker's Allowance (JSA) benefits for at least the 12 months preceding the start of the employment contract. For a definition of long-term unemployment see:	Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-	If you have employed someone that was previously unemployed for more than a year for 6 months (short term contract), please enter 0.5 onto the portal (Full Time Equivalent for a year)

					<p>https://www.gov.uk/government/publications/predicting-likelihood-of-long-term-unemployment-the-development-of-a-uk-jobseekers-classification-instrument-wp116</p> <p>The proxy value has been developed using JSA data benefits, and therefore this is the only type of benefit accepted as it stands.</p> <p>Experience indicates that it is most effective to work with specialist agencies when targeting these</p> <p>The value is additional to SFT1, so that the job can be counted both as SFT1 and in this Measure IF the conditions apply.</p> <p>Do not double count with SFT22. If you have employed someone through a TSO, record the individual under SFT5-8 as these are impact measures. Extract any corresponding fees (management fees, etc). and record these under SFT22.</p> <p>Do not double count with SFT5.a – those unemployed for 6-12 months.</p>	<p>Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).</p>	
More opportunities for disadvantaged people	SFT5.a	C	No. of employees (FTE) taken on who are long term unemployed (unemployed for 6-12 months)	No. of people FTE	<p>The number of full-time annual equivalent (FTE) employees taken on as a result of the contract that had been claiming Jobseeker's Allowance (JSA) benefits for at least 6 months preceding the start of the employment contract. For a definition of long-term unemployment see: https://www.gov.uk/government/publications/predicting-likelihood-of-long-term-unemployment-the-development-of-a-uk-jobseekers-classification-instrument-wp116</p> <p>The value is additional to SFT1, so that the job can be counted both as NT1 and in this Measure if the conditions apply.</p> <p>Do not double count with SFT22. If you have employed someone through a TSO, record the individual under SFT5-8 as these are impact measures. Extract any corresponding fees (management fees, etc). and record these under SFT22.</p> <p>Do not double count with SFT5 – those unemployed for 12+ months.</p>	<p>Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that this is the first employment experience after having been long-term unemployed; 5.) how long they were unemployed for before the start of the employment contract. For example, Employee 1: 1 year; full-time; 1 FTE; this is the first employment experience after 14 months of unemployment. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).</p>	<p>If you have employed someone that was previously unemployed for 6 months, for a year on a part-time basis, please enter 0.5 onto the portal.</p>
More opportunities for disadvantaged people	SFT6 (NT4)	C	No. of employees (FTE) taken on who are not in employment, education, or training (NEETs)	No. of people FTE	<p>The full-time annual equivalent (FTE) number of 16-24 yr. old employees taken on as a result of the contract that had been not in employment, education, or training (NEET) before the start of the employment contract. See the following link for a list of categories included: https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/bulletins/youngpeoplenotineducationemploymentortrainingneet/august2017.</p> <p>Identification of / engagement with these individuals should be done through a specialist</p>	<p>Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) whether this is the first employment experience after having been NEET. For example, Employee 1: 3 months; full-time;</p>	<p>If your employee was NEET and he/she is on a full-time contract for the whole year, please enter 1 onto the portal (Full Time Equivalent for a year)</p>

					<p>organisation which can confirm that they are NEET.</p> <p>The value is additional to SFT1, so that the job can be counted in both measures.</p> <p>Entries for NEETs should not be double counted with SFT7, SFT8.</p> <p>Do not double count with SFT22. If you have employed someone through a TSO, record the individual under SFT5-8 as these are impact measures. Extract any corresponding fees (management fees, etc). and record these under SFT22.</p>	<p>0.25 FTE; this is the first employment experience after being NEET. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).</p>	
More opportunities for disadvantaged people	SFT7 (NT5)	C	No. of employees (FTE) taken on who are rehabilitating young offenders	No. of people FTE	<p>The full-time annual equivalent (FTE) number of employees taken on as a result of the contract that were within the rehabilitation period before the start of the employment contract.</p> <p>Support from Youth Offending Teams (https://www.gov.uk/youth-offending-team), Jobcentre Plus or other agencies carrying out specific programmes may be beneficial in identifying eligible individuals.</p> <p>For guidance about rehabilitation periods see: https://www.gov.uk/exoffenders-and-employment.</p> <p>The value is additional to SFT1, so that the job can be counted in both measures.</p> <p>Do not double count with SFT22. If you have employed someone through a TSO, record the individual under SFT5-8 as these are impact measures. Extract any corresponding fees (management fees, etc). and record these under SFT22.</p>	<p>Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE); 4.) that they were a 18+ year old rehabilitating offender before the start of the employment contract; that this is the first employment experience as an ex-offender. For example, Employee 1: 3 months; full-time; 0.25 FTE; was a 29 years old ex-offender before the start of the employment contract; this is the first employment experience. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).</p>	<p>If you have employed a rehabilitating young offender for the whole year, but he/she will only be working part time, please enter 0.5 on the portal (Full Time Equivalent for a year)</p>
More opportunities for disadvantaged people	SFT8 (NT6)	C	No. of jobs (FTE) created for people with disabilities	No. of people FTE	<p>The full-time annual equivalent (FTE) number of employees taken on that are disabled. A disabled person is defined as someone with a physical or mental impairment that has a 'substantial' and 'long-term' effect on their ability to do normal daily activities (Equality Act 2010). For guidance about employing disabled people and support programmes for employers please see: https://www.gov.scot/publications/fairer-scotland-disabled-people-employment-action-plan/pages/4/</p> <p>Whilst certain individuals may not be comfortable sharing this data, employers cannot adequately provision for disabilities they are not aware of. As such organisations are encouraged to monitor disabilities anonymously. Guidance on this: https://www.tuc.org.uk/research-analysis/reports/monitoring-disability-advice-tuc</p> <p>Experience indicates that it is most effective to work with specialist agencies when targeting these</p>	<p>Specify the number of qualifying employees on this contract (for details on how a qualifying employee is defined please see the Definition box of this Measure). For each qualifying employee, specify: 1.) the duration of employment; 2.) the employment status; 3.) the Full-Time Equivalent (FTE). For example, Employee 1: 3 months; full-time; 0.25 FTE. Provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).</p>	<p>If you have employed a someone with disabilities on contract for a short activity of a 3-month duration (full time), enter 0.25 onto the portal (Full Time Equivalent for a year)</p>

					<p>The value is additional to SFT1, so that the job can be counted in both measures.</p> <p>Do not double count with SFT22. If you have employed someone through a TSO, record the individual under SFT5-8 as these are impact measures. Extract any corresponding fees (management fees, etc). and record these under SFT22.</p>		
More opportunities for disadvantaged people	SFT9 (NT7)	C	No. of hours dedicated to supporting unemployed people into work by providing career mentoring, including mock interviews, CV advice, and careers guidance (over 24 y.o.)	no. hrs*no. attendees	<p>This is the number of staff hours dedicated to one to one or group employment support. it is important that the number of events is recorded/delivered, and outcomes achieved.</p> <p>This measure should be used in conjunction with a survey to better understand outcomes of guidance, specifically attendees' perceived benefits.</p>	Specify the number of sessions, and for each session specify the duration, the number of staff providing unemployment support and the number of unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).	An employee has done a mock interview session with unemployed people over 25 y. o., the session lasted 2 hours, with a total of 10 participants. Please, enter 20 (2 hours *10 attendees) on the portal.
Improved employability	SFT10	G	No. of graduate employment opportunities on contract	No. of weeks	<p>This is the number of graduate employees taken on as a result of the contract. Note: this encompasses all graduates irrespective of place of study/country of origin.</p> <p>An individual is considered a graduate up to 3 years after receiving their qualification. This includes under employed graduates.</p> <p>This can be counted in addition to SFT1. Do not double count with SFT18 (training opportunities) which is for opportunities supported to completion/clearly tagged to a level of qualification. Graduates will have already completed their qualification. If they are training for another qualification on their contract, then this could be included in SFT18.</p>	Specify number of qualifying employees on the contract, including contract type and durations.	If 3 graduates are hired on contract but are working across a number of other contracts please allocate the appropriate proportion of the time which they dedicate to this project only.
Improved employability	SFT11 (NT11)	F	No. of hours dedicated to support young people into work (e.g. CV advice, mock interviews, careers guidance) - (under 24 y.o.)	no. hrs*no. attendees	<p>This is the number of staff hours dedicated to one to one or group employment support specifically for people under 24 y.o.</p> <p>Do not double count with SFT4/9/12/16/24/26/39.</p>	Specify number of sessions, and for each session the duration, number of staff providing unemployment support and unemployed people supported. Describe the activity/activities delivered and provide details of any organisation partnered with. Information provided should be made compliant with data protection requirements (GDPR).	An employee has done a mock interview session with young people between 16-18 y.o., the session lasted 3 hours, with a total of 5 participants. Please, enter 15 (3 hours *5 attendees) on the portal.
Improved employability	SFT12 (RE14)	F	Employment taster days for those interested in working in the real estate and construction industry	£ invested including staff time	<p>Aimed at anyone (school or college pupils, local residents, undergraduates, those unemployed) interested in entering into the real estate and construction industry.</p> <p>The taster day can be facilitated across all professions including construction, design and building management. May be organised by any member of the professional team. The day needs to be properly managed with opportunities for young people to get a view of all aspects of the industry.</p> <p>If courses are run centrally, these should be apportioned to projects in a transparent way.</p>	Provide a breakdown of the costs incurred for each employment taster day. Describe and provide details of each employment taster day, e.g. place, time and number of attendees. Information provided should be made compliant with data protection requirements (GDPR).	Enter the cost in £ of an employment taster day your team has organise (e.g. time spent by staff, material and hiring of spaces).

					Open Doors events are better recorded in SFT17. Log work experience separately which should last at least 1 week to be meaningful (SFT13).		
	SFT13 (NT12)	F	Meaningful work placements or pre-employment courses; 1-6 weeks student placements (unpaid)	no. of weeks	Work placements indicate a temporary work experience within a company, e.g. working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. Only work placements for students of duration of 1 to 6 weeks (typically unpaid) should be registered here. The cumulative number of weeks (from 1 to 6 for each student work placement) should be registered. For guidance please see: https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships . Should not be double counted with SFT14.	Specify the number of people in student work placements or pre-employment courses on this contract, and for each person specify: the duration in weeks and type of the work placement or pre-employment course. Describe the industry-based experience gained and provide details of the school, college or university partnered with. Information provided should be made compliant with data protection requirements (GDPR).	One student stayed within your team for 2 weeks (unpaid) to support on junior level tasks. Please, enter 2 on the portal (the unit is no. of weeks)
Improved employability	SFT14 (NT13)	F	Meaningful work placements that pay Living Wage; 6 weeks or more (internships, paid)	no. of weeks	Work placements indicate a temporary work experience within a company e.g. working on junior-level tasks for the purpose of gaining experience and insight into the industry, or a more skill specific graduate position. The total number of work placements longer than 6 weeks should be recorded. Only placements paid at least minimum or national living wage, as per governmental regulations, should be included. For guidance please see: https://www.gov.uk/guidance/national-minimum-wage-work-experience-and-internships and here https://www.gov.uk/national-minimum-wage-rates . Should not be double counted with SFT13.	Specify the number of people in work placements, and for each person specify: the duration in weeks and type (including pay type, i.e. minimum wage, national living wage, higher wage) of the work placement. Describe the industry-based experience gained and provide details of any organisation, school, college or university partnered with. Information provided should be made compliant with data protection requirements (GDPR).	One student stayed within your team for 7 weeks (paid) to support on junior level tasks. Please, enter 7 on the portal (the unit is no. of weeks)
Improved employability	SFT15	F	% of packages where supplier confirms they follow the Fair Work Framework	%	MEASURE IN DEVELOPMENT		
Improved employability	SFT15.a (RE57)	F	Percentage of women in workforce	%	This is the proportion of women against the proportion of men on a project. For purposes of clarity this is a measurement of those involved directly in the construction process and not those undertaking a head office function.	Provide information on the % share of women working on contract (FTE). The provided data has to be supported by official company employment statistics or other documentation. If the data includes supply chain data suppliers have to provide the respective documentation. The data has to be adjusted for FTE employment to allow for comparability between different kinds of contracts.	Provide information on the combined % share of women and of people that self-identify as women working on contract (FTE). The provided data has to be supported by official company employment statistics or other documentation. If the data includes supply chain data suppliers have to provide the respective documentation. The data has to be adjusted for FTE employment to allow for comparability between different kinds of contracts.
Improved employability	SFT15.b (NT40)	F	Number and type of initiatives to be put in place to reduce the gender pay gap for staff employed in relation to the	£ invested	Guidance on practices that reduce the gender pay gap: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/731288/Gender-Pay-Gap-actions_.pdf	Provide a list of initiatives included and describe their aims and reach, together with any assessment of their impact if available (quantitative or qualitative). For each initiative, provide a breakdown of the £	You can include changes to recruitment and promotion practices, relevant networking and mentoring programmes, flexibility and shared parental leave policies, and specific training for staff (for examples of

			contract (describe and document initiatives)			invested. If you are partnering with any specialist organisation, please provide details.	relevant practices see https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/731288/Gender-Pay-Gap-actions_.pdf) Please provide a description of initiatives to be delivered on the contract and a breakdown of projected costs for each.
Improved skills	SFT16 (NT8)	F	No. of staff hours spent on local school and college visits e.g. delivering careers talks, curriculum support, literacy support, safety talks, introduction to the construction industry	no. staff hours (incl. preparation time)	<p>This is the number of staff hours dedicated to the preparation and delivery of curriculum related activities including literacy support, career talks, safety talks, etc.</p> <p>When using this measure, please ensure you put in place a feedback method to track the effectiveness and impact of visit. An effective schools visit is likely to be part of a co-ordinated programme with specified outcomes (e.g. an engineering design challenge) where employees are providing valuable skills and mentoring to pupils to assist them to achieve programme objectives. Setting objectives and following through to understand the extent to which they were achieved should be part of the planning.</p> <p>If EC ,EDT or similar approaches are adopted, the associated fees can be attributed in the relevant measures such as SFT22, 24, 28, 29, 30 (SME/VCSE spend) or SFT45 (innovation).</p> <p>Should not be double counted with SFT26/38.</p>	<p>Provide the names of the schools/colleges visited and a breakdown of the number of staff hours spent on each visit (including time spent preparing and then delivering the session). For example, if 10 staff have spent 3 hours each on a visit, then the total number of hours reported for that visit should be 30. Describe the visits and the activities delivered and provide any supporting information, e.g. a confirmation from the school/college after the visit. Information provided should be made compliant with data protection requirements (GDPR).</p>	<p>If 2 employees do a talk at a local school, please include preparation time (2 hours) and the time of the presentation (3 hours), that's a total of (6*2 staff) 12 staff hours. Please, enter 12 on the portal.</p>
Improved skills	SFT17 (RE10)	F	No. site visits for school children, colleges or local residents	no. of visits	<p>Site visits for local school children should be organised in tandem with local schools. They should last at least approx. 30-60mins and include a short presentation about the new building and how it will benefit the area. The primary objective of the event is to encourage young people to consider a career in construction including an overview of the variety of roles and possible career options for students, even if they are young students. The event should also be used to make school children aware of the dangers of trespassing on the site out of hours. Useful links: https://www.goconstruct.org/routes-into-construction/experience-construction/visit-a-construction-site/</p> <p>Please ensure you put in place a feedback method to track the effectiveness and impact of visit.</p>	<p>Describe and provide details of each site visit, including the duration and the number of school children or local residents attending each site visit. Information provided should be made compliant with data protection requirements (GDPR).</p>	<p>If you have done 2 sites visits (one for a local school and one for residents), please enter 2 on the portal.</p>
Improved skills	SFT18 (NT9)	F	No. of training opportunities (no. of weeks) created on contract (BTEC, City & Guilds, SVQ, HNC) that have either been completed during the year, or that will be supported by the	no. weeks	<p>Only vocational training opportunities supported to completion should be counted, even when that completion will occur after the end of the contract. Only count training provided to staff (not apprentices). Only count training that can be clearly tagged to a level of qualification (Level 2, 3 or 4+ (which includes graduate training if they are receiving a qualification) This can include charterships.</p>	<p>Specify the number of people in vocational qualification training on this contract and the number of weeks of training per person. Provide details of the accredited training provider, the type and the level of the outcomes achieved as well as the resulting training qualification. Information provided should be made</p>	<p>If you have 3 staff undertaking 5 weeks of training each (3x5=15), please enter 15 on the portal. Note: please, enter the number of weeks (and NOT the no. of staff).</p>

			organisation to completion in the following years - Level 2,3, or 4+		<p>For SG guidance see: https://www.sqa.org.uk/sqa/64561.html</p> <p>Please note, short term courses only count if they are part of a longer-term training programme towards a recognised qualification, e.g. H&S, Management training, etc.</p> <p>Should not be double counted with SFT20 and other measures around apprenticeships or vocational qualifications.</p>	compliant with data protection requirements (GDPR).	
	SFT19	F	% of training opportunities on contract (BTEC, City & Guilds, SVQ, HNC) that have been completed by the end of the contract	%	<p>This is the percentage of training opportunities on contract that have been completed by the end of contract over the overall number of training opportunities on contract. Please refer to the definition of SFT18. (no. of training per week)</p> <p>This includes graduate training.</p>	Same evidence requirement as SFT 18 as well as the overall number of training opportunities on the contract	Total no. of training opportunities on contract that have been completed / Total no. of training opportunity on contract (enter the % onto the portal)
Improved skills	SFT20 (NT10)	F	No. of weeks of apprenticeships on the contract that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+	no. weeks	<p>Only apprenticeships which will be supported to completion should be counted. Only include apprentices' time working on specific project in a proportional manner. Involvement in other projects (in the hub programme) will be picked up in that project's SV matrix. Please include associated study time (ie day release).</p> <p>For a description of the qualification levels see: https://www.gov.uk/what-different-qualification-levels-mean/overview. For finding a registered qualification see: https://accreditation.sqa.org.uk/accreditation/Qualifications/Accreditation_Qualification_Search</p> <p>Please note: all apprenticeships can be allocated here (created, ongoing, completed) as it is presumed that all apprenticeships should be supported to completion.</p> <p>The first year of apprenticeships which involve individuals from the disadvantaged groups identified within SFT 5-8, should be recorded only under those measures. Following years of apprenticeship employment should be recorded under this measure (SFT20), and no longer under SFT5-8.</p> <p>Should not be double counted with SFT18.</p>	Specify the number of people on apprenticeships on this contract and the number of apprenticeship weeks per person. Provide details of the accredited training provider, the type and the level of the apprenticeship achieved as well as the resulting qualification. Information provided should be made compliant with data protection requirements (GDPR).	If you have 3 apprentices working on contract (all staying for a total of 52 weeks), please enter 156 on the portal. Note: please, enter the number of weeks (and NOT the no. of apprentices).
Improved skills	SFT21	F	% of apprenticeships that have been completed by the end of contract - Level 2,3, or 4+	%	<p>This is the percentage of apprenticeships that have been completed by the end of contract over the overall number of apprenticeships started on the contract. Please refer to the definition of SFT20. (no. of apprentices per week)</p>	Same evidence requirement as SFT20 as well as the overall number of apprenticeships on the contract.	Total no. of apprenticeships on contract that have been completed / Total no. of apprenticeships on contract (enter the % onto the portal)

Entrepreneurial, inclusive and sustainable economy

More opportunities for local businesses, SMEs and VCSEs	SFT22 (NT14)	A	Total amount (£) spent with TSOs (Third Sector Organisations) within your supply chain	£	Amount spent on suppliers for the contract that are voluntary, community or social enterprises. This might include a furniture service that recycles donated furniture, or a social enterprise recruitment consultancy, etc. Social Enterprise UK have a useful tool to identify	Provide a breakdown of pounds spent with VCSEs within your supply chain on this contract, including the name of the VCSEs and the type of goods/services procured from each. +H50	Your team needs to buy security helmet for the people on site and found a local charity that produce security helmets (made by ex-offenders). If you buy 200 helmets at £30
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					<p>social enterprises that have membership with them based on location https://www.socialenterprise.org.uk/members-map</p> <p>Please include £ equivalent for any TSO spend on goods, materials and services (this can be captured in prelims/overhead costs).</p> <p>You may refer to the local economic development team in the council to identify potential partners. Please note: the proxy value represents the difference that spending through a VCSE would make as opposed to spending with a standard, for profit company, based on an assumption about the increased level of 'financial recycling' in the community that would take place.</p> <p>Please note: Incorporating social value should not increase costs - this measure is there to reward those who make an effort to include TSOs into their supply chain and to highlight the benefit to society of doing so. Social value is about additionality (ie what is done above and beyond what is required of the contract), so if a Participant was to prescribe the use of TSOs in the supply chain then this no longer be counted in this measure. We find that by not prescribing any of the measures, organisations will highlight the good work that they would already do, and hence this does not increase cost.</p> <p>If the amount spent is through a LOCAL supplier, enter the same value in SFT28.</p> <p>Do not double count with SFT5-8. If you have employed someone through a TSO, record the individual under SFT4-6 as these are impact measures. Extract any corresponding fees (management fees, etc). and record these under this measure.</p>		pounds each, input £6000 on the portal.
More opportunities for local businesses, SMEs and VCSEs	SFT23	A	% of contracts awarded to TSOs	%	<p>This is the percentage of contracts awarded to TSOs relative to the overall number of contracts awarded.</p> <p>Please refer to the definition of SFT22.</p>	Same evidence requirement as SFT22 as well as the overall number of contracts	Total no. of contracts awarded to TSOs / Total no. of contract awarded (enter the % onto the portal)
More opportunities for local businesses, SMEs and VCSEs	SFT24 (NT15)	A	Provision of expert business advice to TSOs and SMEs in the supply chain (e.g. financial advice / legal advice / HR advice/HSE - Building for Growth Programme, workshops, Construction Specific Learning events etc.)	no. staff expert hours	<p>This is expert staff time (e.g. financial advice / legal advice / HR advice / HSE) dedicated to support Voluntary Community or Social enterprises or SMEs. Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the tool kit guidance document for worked out examples on attribution.</p> <p>Should not be double counted with SFT9/16/11/26/39/45</p>	Provide a breakdown of the estimated pounds to be spent with VCSEs in your supply chain on this contract, including the name of the VCSEs (or a range of potential names) and+H50	Your Financial Manager delivered a workshop to your subcontractors on finance and audit. The workshop lasted 2 hours. Please, input 2 on the portal.
	SFT25 (NT16)	A	Equipment or resources donated to TSOs	£ value	This could be e.g. donating a van to a community organisation, or the use of office accommodation, etc.	Provide a breakdown of the equivalent value of resources and/or equipment donated to	You have donated a van to a community organisation. The van is estimated to be worth £3,000.

More opportunities for local businesses, SMEs and VCSEs			(£ equivalent value)		Attribution might need to be considered where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the tool kit guidance document for worked out examples on attribution. Should not be double counted with SFT26/38.	each VCSE, including evidence of the donations and the names of the VCSEs supported.	Please, enter £3,000 on the portal.
More opportunities for local businesses, SMEs and VCSEs	SFT26 (NT17)	A	Number of voluntary hours donated to support TSOs (excludes expert business advice)	no. staff volunteering hours	Volunteering is defined by the International Labour Organisation (2001) as 'unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household'. Here only staff volunteering hours should be recorded when time has been allocated for staff to spend on formal volunteering (not for family and friends). Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees. Please see the tool kit guidance document for worked out examples on attribution. Should not be double counted with SFT25/37/38/39/45.	Specify the name of the VCSEs supported, the volunteering activities delivered and their intended purposes. Provide a breakdown of staff volunteering hours delivered to VCSEs. Information provided should be made compliant with data protection requirements (GDPR). Confirmation of TSO is also accepted.	If one employee has spent his 2 days of volunteering day (2 days offered by your company - taken from staff time), raising money for an Oxfam project. Enter 14 (7 hours*2) onto the portal.
More opportunities for local businesses, SMEs and VCSEs	SFT27 (RE21)	A	Meet the buyer' events held to highlight local supply chain opportunities	£ invested including staff time	Opportunity for local suppliers, especially SMEs and VCSE to understand the potential of providing their services, goods or works to the development throughout its lifecycle from construction through to management and occupation. Providers need to ensure that the event is properly advertised and that specific opportunities have been identified. Providers where possible should also invite potential suppliers whom they think may be able to benefit. Advice about how to tender successfully should be made available. Time spent supporting such events can also be recorded in SFT37/38 (either in volunteering time or expert time). Useful links: https://www.cips.org/en-GB/supply-management/opinion/2014/november/how-to-revitalise-your-meet-the-buyer-events/	Provide a breakdown of costs incurred for Meet the Buyer events held for this contract. Provide details of each Meet the Buyer event, e.g. place, time and number of attendees. Also provide names of attending supply chain organisations. Information provided should be made compliant with data protection requirements (GDPR).	Enter the £ invested in meet the buyer event held in the local area (e.g. the price to host an employment fair including hours spent, material, etc.)
More opportunities for local businesses, SMEs and VCSEs	SFT28 (NT18)	A	Total amount (£) spent in LOCAL supply chain through the contract (Territory)	£	This should be calculated as the cumulative spend with suppliers which are not MSMEs that are based within the local area/Territory . Please note: the portal does not currently reflect regional value but will be calculated in due's course. Should not be double counted with SFT22/30.	Provide a breakdown of pounds spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of goods/services procured from each and the first three digits of their postcode.	Enter the cumulative spend of local/Territory suppliers (EXCLUDING MSMEs - see SFT30)
More opportunities for local businesses, SMEs and VCSEs	SFT29	A	Value of work awarded to Scottish MSMEs - Total amount (£) spent through contract to	£	This should be calculated as the cumulative spend with SME suppliers that are based within SCOTLAND . Should not be double counted with SFT1/22/28/SFT30.	Provide a breakdown of pounds spent with organisations in your local supply chain on this contract. Specify the name of each eligible supplier, including the category/industry of	You spend £20,000, £3,000 and £10,000 with 3 Scottish suppliers (outside of your Territory). Input 33,000 on the portal (£20,000 + £3,000 + £10,000 = £33,000)

			Scottish Micro, Small and Medium enterprises (MSMEs) - excluding Territory MSMEs (see measure below)			goods/services procured from each and the first three digits of their postcode.	Please make sure you do not double count with SFT1 To avoid double counting, if the information regarding people FTE is readily available, deduct the corresponding change (in SFT1's proxy value) from SFT29/30. For example, you have spent £500,000 through contracts with MSMEs and this includes 2 FTE employees. In SFT1 enter 2. In SFT30 enter 500,000 - (2*28,354) = 500,000 - 56,708 =443,892.
More opportunities for local businesses, SMEs and VCSEs	SFT30 (NT19)	A	Value of work awarded to Local MSMEs - Total amount (£) spent through contract to Territory Micro, Small and Medium enterprises (MSMEs)	£	This should be calculated as the cumulative spend with SME suppliers that are based within the local area/hubCo Territory Should not be double counted with SFT1/22/28.	Provide a breakdown of pounds spent with organisations in your local supply chain. Specify the name of each eligible supplier, specifying that it is a Micro, Small or Medium Enterprise, and include the category/industry of goods/services procured from each and the first three digits of their postcode.	You spend £100,000, £300,000 and £1,000,000 with 3 LOCAL suppliers within your Territory. Input 1,400,000 on the portal. Please make sure you do not double count with SFT1 To avoid double counting, if the information regarding people FTE is readily available, deduct the corresponding change (in SFT1's proxy value) from SFT29/30. For example, you have spent £500,000 through contracts with MSMEs and this includes 2 FTE employees. In SFT1 enter 2. In SFT30 enter 500,000 - (2*28,354) = 500,000 - 56,708 =443,892.
More opportunities for local businesses, SMEs and VCSEs	SFT31	A	% of contracts awarded to MSMEs (Scottish and Territory)	%	This is the percentage of contracts awarded to MSMEs over the overall number of contracts awarded. Please refer to the definition of SFT30.	Same evidence requirement that SFT30 as well as the overall number of contracts	Total no. of contracts awarded to MSMEs / Total no. of contract awarded (enter the % onto the portal)
Improved staff wellbeing	SFT32 (NT20)	H	No. of employees on the contract that have been provided access for at least 12 months to multidimensional wellbeing programmes that include flexible working time arrangements; healthy nutrition options; physical health programmes; a health risk appraisal questionnaire; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness	no. employees provided access	Total number of direct or supply chain employees on contract provided with access to comprehensive workplace wellbeing programmes. These include: flexible working time arrangements; healthy nutrition options; physical health programmes; a health risk appraisal questionnaire; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues). Please only include initiatives focused upon Tier 1 and Supply Chain, not general community.	Please upload a description of the wellbeing programme you have delivered and the number of people on the contract that had access to that. Provide evidence for all of the following for the contract context: employment contract based flexible working time arrangements; access to healthy nutrition options and physical health programmes; if available provide information on use rate of healthy nutrition options and physical health programmes. Information on physical health programmes can include the structure of health and wellbeing support and advice; evidence on and structure of health risk appraisal questionnaire; access to health and wellbeing resources (health improvement web portal; information on use of wellness literature; availability and times of	Summarise your strategy for providing access to a comprehensive workplace wellbeing programme to all employees, including measures in place or planned. Describe how the programme you are going to deliver is going to be structured around the following dimensions: flexible working time arrangements; healthy nutrition options; physical health; health risk appraisal questionnaires; access to health and wellbeing resources (e.g. a tailored health improvement web portal; wellness literature; and seminars and workshops focused on identified wellness issues).

			literature; and seminars and workshops focused on identified wellness issues)			seminars and workshops focused on identified wellness issues). If you are partnering with any specialist organisation, please provide details.	
Improved staff wellbeing	SFT33 (NT23)	K	% of contracts with the supply chain on which Social Value commitments, measurement and monitoring are required	% of contracts	This includes quantitative requirements in terms of social value delivered, monitoring and measurement mechanism for delivery (e.g. the National TOMs system or equivalent). This is to ensure the pass down of SV requirements through the tendering Supply Chain.	Specify the total number of procurement contracts on this contract and the total number of contracts that include commitments to deliver social value on this contract. Explain how you have monitored and measured social value delivered through the supply chain on this contract, including how you have engaged with your supply chain to promote social value.	Total no. of contracts that includes Social Value commitments [...] / Total no. of contract (enter the % onto the portal)
	SFT33.a (NT21)	H	Equality, diversity and inclusion training provided both for staff and supply chain staff	no. hrs (total session duration) *no. attendees	This includes training provided to own staff, Tier 1 supply chain and subcontractors specifically around equality, diversity and inclusion. Record the cumulative number of hours experienced by the attendees and specify both separately as a description. Only training provided for supply chain organisation at no cost to them should be included. Should not be double counted with NT20.	Provide a breakdown of staff hours spent providing equality, diversity and inclusion training to own staff and supply chain organisations on this contract, including the number of people involved in the training. Describe the objectives of the training session(s) and how progress towards these objectives will be monitored over the course of the contract. Information provided should be made compliant with data protection requirements (GDPR). If you are partnering with any specialist organisation, please provide details.	Describe your strategy for delivering equality, diversity training to own staff and supply chain on this contract. Provide a workplan, including number of staff hours that will be spent and the number of people that will be involved in the training both from your own organisations and from those in the supply chain. Explain the objectives of the training session/s and how progress towards these objectives will be monitored over the course of the contract.
Sustainable procurement is promoted	SFT34	I	% of procurement contracts that include commitments to sustainable procurement, as set out in the Sustainable Procurement Guidance set out by the Scottish Government.	%	MEASURE IN DEVELOPMENT	.	
Inclusive, empowered, resilient communities							
Healthier communities	SFT35 (NT26)	H	Initiatives taken or supported to engage people in health interventions (e.g. stop smoking, obesity, alcoholism, drugs, etc) or wellbeing initiatives in the community, including physical activities for adults and children.	£ invested including staff time	This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for supporting such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. A detailed description of the relevant initiatives should be provided, together with a method statement and a work plan. When support is being provided as part of a wider company programme (e.g. a nation-wide initiative or collaboration with a Charity) attribution should be considered. Please see the tool kit guidance document for worked out examples on attribution. If a hubCo facilitates	Provide a breakdown of pounds (including number of staff hours valued at £16.07 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at improving health and/or wellbeing in the community. Describe the type of health and/or wellbeing issues you have addressed, including how and where you have done so. Provide details of your initiatives and any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for	Staff volunteering time should be valued at £14.80 (2017/2-18 prices) per hour, as per 2017 ONS guidance. You have organised a community event around your site about obesity with Obesity Action Scotland. 2 staffs stayed for the whole day (7 hours*2*£14.80 = 207.2) and you have donated £1,000 to OAS for the day. Please, enter 1,207.2 on the portal.

					territory wide/non project specific events, these should be apportioned across the programme. Should not be double counted with SFT25/26/37/38/39	the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).	
Vulnerable people helped to live independently	SFT36 (NT27)	D	Initiatives to be taken to support older, disabled and vulnerable people to build stronger community networks (e.g. befriending schemes, digital inclusion clubs)	£ invested including staff time	This could be run in partnership with a VCSE or as part of a company programme. The cumulative cash value should be recorded for supporting such initiatives. Equivalent cost of equipment and volunteering hours should be recorded separately in the appropriate categories. A detailed description of the relevant initiatives should be provided, together with a method statement and a work plan. When support is being provided as part of a wider company programme attribution should be considered. Please see the tool kit guidance document for worked out examples on attribution. Should not be double counted with SFT25/26/38/39.	Provide a breakdown of pounds (including number of staff hours valued at £16.07 per hour - i.e. the general value for volunteering (NT17)) invested in initiatives aimed at supporting older, disabled and vulnerable people to build stronger community networks. Describe the groups you have supported and the activities you have delivered, including how and where you have done so. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).	You have organised a digital inclusion class for local vulnerable residents around your site with Digital Xtra, a Scottish charity . 1 staff member stayed for 3 hours (3 hours*(SFT24(expert) or SFT26(volunteering) value)= X) to help vulnerable people and you have donated 3 computers to the charity (worth £1,500). Please, enter 1,500 + X on the portal.
Strengthened communities	SFT37 (NT28)	D	Donations or in-kind contributions to local community projects (£ & materials)	£ value	This could be a cash donation or the equivalent value of in-kind contributions - e.g. donating a van to a community organisation - that have been made for a specific community project. Equivalent £ value should be calculated and assumptions and details about the calculation should be made explicit. Attribution might need to be taken into account where resources are being donated not strictly as a result of commitments made in relation to the contract. There needs to be a clear link to the contractual activity. Please see the tool kit guidance document for worked out examples on attribution. Should not be double counted with SFT25/36.	Provide a breakdown of the pound equivalent value of donations and/or in-kind contributions donated to local community projects. Describe the local community projects you have supported. Provide details of any organisations you have partnered with. Where an additional multiplier has been added at Measurement as a result of specific impact assessments for the initiatives reported (e.g. SROI), the reports for each assessment should be provided. There is an expectation for independently assured and audited reports to be provided. Information provided should be made compliant with data protection requirements (GDPR).	You have donated material (painting material worth £1,000) and donation (£2,000) to a local art community project around site. Please, enter £3,000 onto the portal.
Strengthened communities	SFT38 (NT29)	D	No hours volunteering time provided to support local community projects (e.g. community benefit days)	no. staff volunteering hours	Please refer to the definition of the local area specified for SFT1. Volunteering is defined by the International Labour Organisation (2001) as 'unpaid non-compulsory work; that is, time individuals give without pay to activities performed either through an organisation or directly for others outside of the household'. Here only staff volunteering hours should be recorded when time has been allocated for	Describe the volunteering activity/activities you have delivered and the local community projects you have supported. Provide details of any organisations you have partnered with. Provide a breakdown of staff volunteering hours delivered to local community projects. Only	2 of your staff have spent 4 hours with a local charity supporting homeless around your construction site, giving out some food. Please, enter 8 (2*4) on the portal

					<p>staff to spend on formal volunteering (not for family and friends). In the case of local community projects there might not be a community organisation at the receiving end of the volunteering, but it might be an initiative set up by the company itself based on local intelligence. Time invested in organising such activities must be recorded in this category on top of the staff volunteering time itself. Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees (please see the tool kit guidance document for worked out examples on attribution).</p> <p>Should not be double counted with SFT16/26/36/37/45</p>	<p>regular work hours and paid overtime hours can be counted as volunteering hours. Information provided should be made compliant with data protection requirements (GDPR).</p>	
Strengthened communities	SFT39 (NT30)	D	Support provided to help local community draw up engagement plan	£ invested including staff time	<p>A community engagement plan is a document designed by the community that identifies needs and opportunities, and direct business that can help towards specific deliverables. This could be provided through coordinating or facilitating the process. Supporting a local community coordinator means agreeing to be a sponsor and sign up to the initiatives, ie by directing staff volunteers towards them.</p> <p>The purpose of this is to enable communities to have their say. If you have other methods of doing this (steering groups for example) please feel free to count them wherever makes sense (social innovation measures for example).</p> <p>An example of contribution towards developing a community engagement plan would include the time that the Supply chain commits to engaging with stakeholders in defining their requirements for the new planned facility – ie engaging with the PTA in respect of a new educational facility.</p> <p>Should not be double counted with SFT24/37/38.</p>	<p>Provide a breakdown of pounds invested to help the local community draw up their own Community Charter or Stakeholder Plan (including number of staff hours valued at £16.07 per hour - i.e. the general value for volunteering (NT17)). Provide a copy of the Community Charter or the Stakeholder Plan and details of any organisations you have partnered with. Information provided should be made compliant with data protection requirements (GDPR).</p>	<p>You have spent £500 on an event which will help the local community draw up a plan to better address their needs. Enter 500 on the portal.</p>
Protecting and enhancing the environment							
Sustainable use of resources	SFT40	I	Actions demonstrating achievement of Scottish Government Sustainability Aspirations	Record only	Measure is a work in progress: more detailed guidance to be developed in due course.		
Sustainable use of resources	SFT41	I	Circular economy activities	Record only	MEASURE IN DEVELOPMENT		
Sustainable use of resources	SFT42 (RE39)	I	CO2e Savings from energy efficiency measures against baseline (e.g. REEB)	kWh/m2	CO2e Savings arising from energy efficiency measures during construction or in-use. Savings to be measured against an accepted benchmark such as REEB or a 3-year baseline (evidence to be provided) or metering data or statement from Energy Manager based on savings on a 3-year baseline (i.e. degree day adjusted average). May include use of energy	Specify the total number of buildings and the total number of buildings meeting the energy savings target. Provide details of the target and how it has been reached, together with chosen baseline.	Please, either measure your saving against a relevant benchmark such as REEB or against a 3-year baseline. The aim is to measure the savings you have made "beyond" what is expected. Please, enter the no. of kWh/m2.

					<p>efficient equipment above required minimum standards.</p> <p>Note: ONLY report reductions which have resulted from energy efficiency measures. ie reductions due to less people being in the office during holidays do not count for example.</p>		
Air pollution is reduced	SFT43 (NT32)		Car miles saved on the project (e.g. cycle to work programmes, public transport or carpooling programmes, etc.) (against baseline)	Car miles saved	<p>These could be resulting from cycle to work programmes for employees or sustainable company transport provided for employees on the project, or carpooling initiatives.</p> <p>Attribution should be considered when programmes span beyond the contract scope. Please see the tool kit guidance document for worked out examples on attribution.</p> <p>Savings need to be part of a clear plan with a measurable baseline and evidence must be provided.</p>	Provide details of the corporate green transport programme implemented to reduce passenger car miles driven, including a breakdown of the number of car miles saved and how they have been saved. Specify the baseline that is used (i.e. car miles driven before a programme was put in place to reduce car miles driven) and full methodology of calculation.	If you have saved 2 hundred miles through a car sharing programme, enter 200 on the portal
Air pollution is reduced	SFT43.a (NT33)		Car miles driven using low or no emission staff vehicles included on project as a result of a green transport programme	Car miles driven	These benefits are expected to be delivered as a result of transport programmes. Examples of evidence would be fleet reports or mileage logs. There is an expectation for independently assured and audited reports to be provided.	Fleet report and mileage log. There is an expectation for independently assured and audited reports to be provided.	No. miles driven on contract on LEV as part of a specific sustainable transport programme
Better places to live	SFT44 (NT34)		Voluntary time dedicated to the creation or management of green infrastructure, to increase biodiversity, or to keep green spaces clean	no. staff volunteering hours	<p>See previous definition of volunteering (SFT38). Relevant initiatives might include e.g. operating specific equipment for maintenance of community parks and green spaces, etc.</p> <p>Please include only the amount of volunteering that has been provided by staff during working hours or on overtime, or that has been delivered as a direct result of an activity organised by the organisation and agreed with the employees (Please see the tool kit guidance document for worked out examples on attribution).</p> <p>Do not include materials provided/donated - record these in STF45 instead. Should not be double counted with SFT16/26/36/37/39</p>	For each initiative or project supported, provide a breakdown of volunteering and staff time invested, alongside other investment. Only volunteering hours spent during work hours or paid overtime hours can be counted.	4 of your staff have been spending an afternoon (3 hours) gardening around the site with local residents (community garden). Enter 12 onto the portal (4 staff *3 hours)
Social innovation							
Other measures (TBD)	SFT45 (NT50)		Innovative measures to promote local skills and employment to be delivered on the contract - these could be e.g. co-designed with stakeholders or communities, or aiming at delivering benefits while minimising carbon footprint from initiatives, etc.	£ invested - including staff time (volunteering valued at £16.07 per hours, expert time valued at £96.11 per hour) and materials, equipment or other resources	This would include innovative solutions, or initiatives that are not specifically covered in the previous categories.	Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.07 per hour), staff time expert advice (valued at £96.39), equipment or equivalent value of other assets should be provided.	Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.07 per hour or at £96.39 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Other measures (TBD)	SFT46 (NT51)		Innovative measures to promote and support responsible business to be delivered on the contract - these could be e.g. co-designed with stakeholders or communities, or aiming at delivering benefits while minimising carbon footprint from initiatives, etc.	£ invested - including staff time (volunteering valued at £16.07 per hours, expert time valued at £96.11 per hour) and materials, equipment or other resources	This would include innovative solutions, or initiatives that are not specifically covered in the previous categories.	Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.07 per hour), staff time expert advice (valued at £96.39), equipment or equivalent value of other assets should be provided.	Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.07 per hour or at £96.39 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.
Other measures (TBD)	SFT47 (NT52)		Innovative measures to enable healthier, safer and more resilient communities to be delivered on the contract - these could be e.g. co-designed with stakeholders or communities, or aiming at delivering benefits while minimising carbon footprint from initiatives, etc.	£ invested - including staff time (volunteering valued at £16.07 per hours, expert time valued at £96.11 per hour) and materials, equipment or other resources	This would include innovative solutions, or initiatives that are not specifically covered in the previous categories.	Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.07 per hour), staff time expert advice (valued at £96.39), equipment or equivalent value of other assets should be provided.	Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.07 per hour or at £96.39 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.
Other measures (TBD)	SFT48 (NT53)		Innovative measures to safeguard the environment and respond to the climate emergency to be delivered on the contract - these could be e.g. co-designed with stakeholders or communities, or aiming at delivering benefits while minimising carbon footprint from initiatives, etc.	£ invested - including staff time (volunteering valued at £16.07 per hours, expert time valued at £96.11 per hour) and materials, equipment or other resources	This would include innovative solutions, or initiatives that are not specifically covered in the previous categories.	Please provide a project report that evidences the activities carried out during the reporting period, their impact, the range of expert services provided, and a description of partnering organisations if any. A breakdown of pounds invested per type of investment - e.g. cash, staff time volunteering (valued at £16.07 per hour), staff time expert advice (valued at £96.39), equipment or equivalent value of other assets should be provided.	Describe the initiatives and their relevance to the Measure. A breakdown of pounds (including number of staff hours valued at £16.07 per hour or at £96.39 if it is expert time) should be provided. Provide details of any organisations you will work with and specify whether they will be covering the reported cost with you and how.

Project Request, Payment and Using the Portal

1. Establishing a project on the Portal and payment

- a) Project set up: Hubco to send the Project Request Form (including a PO number if necessary) to marie.binnert@socialvalueportal.com .
- b) Payment: This will be calculated on the basis of a fee per project of £500 p.a.
 - The initial invoice will be 25% of the yearly project fee (£125), this enables initial target setting to be undertaken and any pre-construction data to be recorded during the project development stage
 - The remaining balance will be invoiced when construction commences. (see above comment)
 - Y1 the remaining 75% (£375)
 - Y2 onwards (for multi-year project) £500 p.a.
- c) 3. Portal Access: Once the initial payment is made, the project will be set up on the portal and hubCo and the appointed Tier 1 Contractor will be provided with access to the portal and the project.

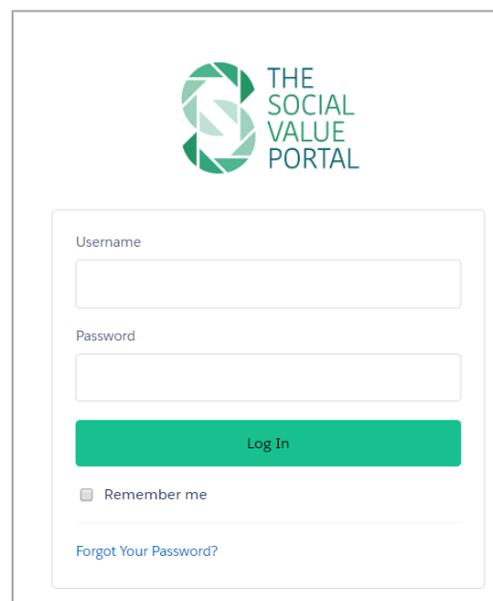
2. Logging in

Your social value advisor will grant your access to the portal, and you will receive your login credentials via email.

To log in to your account, please navigate to:

- <https://socialvalueportal.force.com/login>

You can find this link on the Social Value Portal website, in the menu under Login/Register.



THE SOCIAL VALUE PORTAL

Username

Password

Log In

Remember me

[Forgot Your Password?](#)

Please note:

To ensure the best view of the portal, please use a modern browser ideally with the latest versions. Older browsers may not display dashboards and reports correctly.

Forgotten password

To request a password reset, please click on the 'Forgot Your Password' link on the login page, or go to: <https://socialvalueportal.force.com/secur/forgotpassword.jsp>

After you have received the reset link, please set up your new password using your Social Value Portal username, in the format firstname.lastname@socialvalueportal.com

Alternatively, get in touch with the Social Value Portal team at support@socialvalueportal.com to request a password reset. A new password setup email will be sent to your registered email address.

3. Start Page

Once you have logged in, you will arrive at the Start Page.

To view your account, press **CLICK HERE TO START**.



RESOURCES

What is Social Value?



What is included in the term 'Social Value', and how can it be measured in a fair and transparent way?

National TOMs



Learn more about the National TOMs Framework, which provides a minimum reporting standard for measuring social value.

Case Studies



Read more about how Social Value has been successfully delivered in practice through a selection of past projects.

SVMI



The Social Value Maturity Index is a method for determining where you are on the journey compared to your peers, and to understand what steps you need to take next.



HELP

Do you have a question about how the Social Value Portal works? Get in touch with the support team using the button below.

[Support](#)



USER GUIDANCE

Do you have a question about how the Social Value Portal works? Get in touch with the support team using the button below.

[National TOMs: Guidance, Definitions, Evidence](#)

[Intro to Measuring Social Value](#)



SOCIAL VALUE MATURITY INDEX

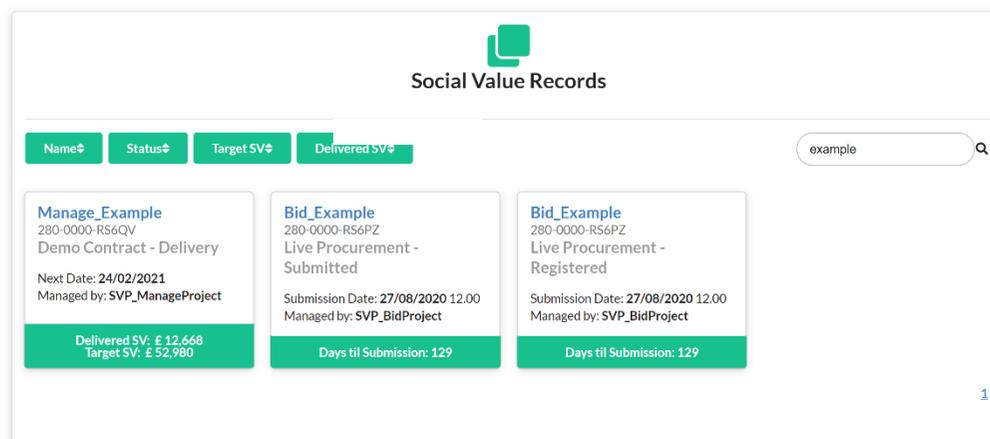
Are you a Follower, Mature, a Leader or an Innovator when it comes to Social Value? Try our online quick questionnaire, or download the SVMI tool here.

[Find Out More](#)

Up to date versions of this *User Guidance* document along with *National TOMs: Guidance, Definitions, Evidence* and other resources will be available to download on this page; please check back regularly to ensure you have the latest version.

4. Your Account Page

Your Account page provides an overview of registered on the portal.



You can sort your Records by name or status, Each Record overview will include:

- The name of the project/tender
- The SVP Project reference (OKO-XXXX-when contacting the Social Value Portal)
- The name of the organisation managing the project/tender
- Your project/tender status – *Registered, Submitted or Delivery*

Registered – Registration of user to the project is complete and social value response has not yet been submitted

Submitted – User’s social value submission has successfully been submitted

Delivery – User is in contract management stage (i.e. Contract has been awarded and user is reporting on social value delivery)

To edit or add your Social Value Responses, navigate to the specific project/tender by pressing ‘*CLICK TO VIEW*’

5. Your Social Value submission

Your Social Value Portal account allows you to enter and edit your target/actual Social Values and upload evidence to support your response. Target values are entered post-bid phase; actual values are entered during the delivery phase.

To complete your social value submission, navigate to the Social Value Calculator by selecting the project that you would like to edit. This will open the Social Value Calculator page where you can:

1. Enter and save your project contract value (£)
2. Access the Social Value Calculator to add or edit your responses
3. Upload general pieces of evidence (please add evidence for specific measures using the ‘View/Add Attachments’ links on the Calculator Page.
4. Export your responses to PDF

all the projects/tenders that you have

or search for them in the search bar.

XXXXX) – please quote this reference

The image shows a four-step process flow for social value submission:

- 1. CONTRACT VALUE:** A form with a pound sign icon, a text input field for 'fee/contract value/bid price', a 'Save' button, and a '*Required' note.
- 2. SOCIAL VALUE CALCULATOR:** A form with a calculator icon, an 'Enter Social Value Calculator' button, and displays 'TARGET SOCIAL VALUE £ 8,826' and 'WEIGHTED SOCIAL VALUE SCORE £ 10,979'. It includes an 'Export Responses to PDF' button.
- 3. UPLOAD EVIDENCE:** A form with a paperclip icon, an 'Attach File' button, and displays 'NO. OF ATTACHMENTS UPLOADED 0'. It includes a 'View Files' link and a text box explaining how to use the 'Attach File' button.
- 4. SUBMISSION STATUS:** A form with a cloud upload icon, displays 'STATUS REGISTERED', and includes a 'Confirm Submission' button. A text box explains that pressing 'Confirm Submission' will change the status to 'Submitted' before the submission date.

Please note:

- You are **not** required to enter targets against every measure listed on the Social Value calculator (unless measures have been marked as **MANDATORY** by the client)
- You should only enter targets against the measures that are relevant to your delivery capabilities and that you have capacity to deliver on the contract and that are proportional to the contract.
- You should **not** enter any company-wide CSR information.

4.1 Enter your contract value

You are required to enter your 'fee/contract value/bid price'. This value should be equal to that provided within your overall price/qualitative submission.

If you have questions regarding how to complete this field, please contact the procurement or contract manager for the project.

Enter the value in the 'Contract Value' box and press 'Save'.

4.2 Entering your social value responses

To open the Social Value Calculator, click 'Enter Social Value Calculator'. This will display all questions relating to your project/tender, organised by Theme and Outcome.

Each question includes a social value Measure, a specified unit of measurement, the social value proxy associated with each measure, and a description/evidence box.

This is where you will be able to insert your targets and your delivered social value responses.

The screenshot shows a social value calculator interface for a mandatory measure:

- Navigation:** Definition (selected), Guidance, Additional Details, Evidence Requirements, Link.
- THEME:** Safer and stronger communities. **OUTCOME:** All communities feel they are valued.
- Measure:** *MANDATORY* 1. No. of new volunteering opportunities created locally as a result of the contract (No. of hours and describe how you would like to contribute)
- Units:** hrs (with icons for units)
- Proxy:** £17.50
- Prioritisation:** 2.00
- Target Response:** Input field containing '123.00'
- Brief Description:** Input field with a 'Description' label and an 'Add/View Attachments (0)' link.
- Target Response split by Reporting Period:**

1: 12/9/20	2: 12/12/20	3: 12/3/21	4: 12/6/21	5: 12/9/21	6: 12/12/21
1.00	1.00				

Each measure in the calculator contains additional general information relating to the measure that can be access by hovering over the icons below:

Units

Please note the specified unit of measurement associated with each question. It is important that the correct units are used for each social value response, to ensure accurate calculation of social value.

Targets

Please enter social value targets for each measure you will deliver during this contract only, ensuring that you read the question carefully and understand the units required by each measure.

Proxy values

Where a proxy social value has been linked to a measure, the calculation and resulting Social Value Add (ESVA) is shown alongside the target. More information on understanding proxy values is available to download from our website: <http://socialvalueportal.com/national-toms/>

Description and supporting evidence

Bidders should include a brief description of how they will deliver a measure in the text box provided.

If you wish to upload a longer response than the text box allows, or provide supporting documentation/evidence, you can upload this as an attachment. Click 'Add/View Attachments' to open the attachment pop-up window. Follow the instructions to upload your attachment.

Please check the Guidance, Additional Details or Evidence Requirements for each measure, where available, to ensure that you are meeting all relevant requirements.

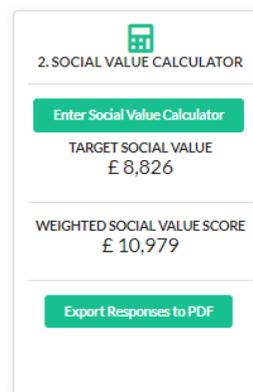
Please note:

- You can calculate your Target Social Value at any time by pressing 'Save and Calculate'. The updated Social Value will appear at the top of the page. When you have finished editing your responses, press 'Save and Close' to recalculate and return to the submission page.
- Pressing 'Close' will return you to the submission page **without saving your changes**.
- Pressing 'Print Page' will open your browser print dialogue.
- Your session will timeout after 2 hours of inactivity. Please ensure that you press 'Save and Calculate' regularly to avoid losing any data. After 30 minutes of inactivity, a pop-up will display to remind you to save your data.

4.3 Export a PDF report for download

If you would like to create a PDF report detailing your Social Value report will be generated and stored in the 'Evidence and Reports'

You may also choose to download your Social Value Responses, Calculator for your specific project/tender, or Download the National area.



2. SOCIAL VALUE CALCULATOR

Enter Social Value Calculator

TARGET SOCIAL VALUE
£ 8,826

WEIGHTED SOCIAL VALUE SCORE
£ 10,979

Export Responses to PDF

responses against each question, use the 'Export Responses to PDF' button. A section. To open the report in your browser, click 'View'.

view/download a copy of all questions included within the Social Value TOMs Guidance, Definitions and Evidence Requirements from the Downloads

6. Export Your Account Data

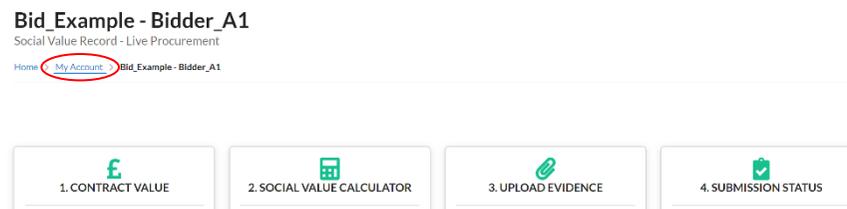
To export a summary of your account data,



first return to your Account page *here*:

Then, scroll down past your Social Value Records where you can download an Account Summary Report, in CSV format, that includes all your project/tenders and the following information:

- SVP Project Reference
- Name
- Owner
- Project Type
- Contract Value
- Actual/Target Social Value
- Actual/Target Social Value Added as a % of the Contract Value
- The project/tender's progress towards achieving the Target Social Value
- The submission status



7. Help and support

For questions regarding your project, please get in touch with your procurement or contract manager directly.

For technical issues or queries specifically relating to the use of the Social Value Portal, you can contact our support team in the following ways:

- Email marie.binnert@socialvalueportal.com
- Use the online contact form – you can find the link at the bottom of each page on the Social Value Portal, or visit: https://socialvalueportal.force.com/VF_Help

Our support team will respond to your query as quickly as possible. Please allow up to **one working day** for a response.

8. Version Control

Action	Date	Comments
Measure added: SFT1a/NT1c - No. of local people (FTE) on contract for one year or the whole duration of the contract, whichever is shorter, employed through the supply chain as a result of your procurement requirements	October 2020	This is to differentiate between direct employees and supply chain employees.
Measure wording amended: SFT20/NT10 - No. of weeks of apprenticeships on the contract that have either been completed during the year, or that will be supported by the organisation until completion in the following years - Level 2,3, or 4+	October 2020	Reworded to reflect that it is not just new apprenticeships created.
Evidence Requirements updated to TOMs 2020 edition	October 2020	