



SOCIAL VALUE CASE STUDY



EMBEDDING SOCIAL VALUE IN A TRANSFORMATIONAL PARTNERSHIP

WHAT ARE THE HEADLINES?

A consistent and communicable framework

- ❖ We revised a social value framework to make it more consistent and communicable
- ❖ We acted on the results of stakeholder consultation
- ❖ We discovered 'accidental' social value

WHAT IS THE CASE STUDY CONTEXT?

Collaborative working

We are the North Bank Forum (NBF)

- ❖ **Our Aim**
To inform, support and influence the voluntary, community and not for profit sector across Yorkshire and the Humber.
- ❖ **Our Vision**
People in the communities have the services they need to ensure their health and social wellbeing.
- ❖ **Our Mission**
To inform, support and influence the development of services to reflect the needs of their users.

EMBEDDING SOCIAL VALUE IN A TRANSFORMATIONAL PARTNERSHIP

The focus of the case study was to discover how a Social Value Impact tool could be embedded across a broad range of public sector partners. These included: the Local Authority; NHS Hull Clinical Commissioning Group; Humberside Police and the Humberside Fire and Rescue Service. It took place against a backdrop of reduced funding, an emphasis on value for money and improved outcomes for local communities, and a shift to co-commissioning arrangements, particularly around health and social care.

NBF aimed to work in collaboration with Hull City Council, to:

- ❖ **Develop an agreed Social Value Measurement Framework that could be used by all public service commissioners and voluntary and community organisations in Hull.**
- ❖ **Develop a simple reporting tool that would enable social value to become integrated into the contract management process.**
- ❖ **Support voluntary and community sector partners who have historically underperformed in their responses to social value questions, in order to maximise their potential contributions to the delivery of services.**
- ❖ **Produce materials and share the outcomes of their work as a good practice case study.**

Through the development of this work we engaged with a range of partners across both the public and the local voluntary and community sectors.

Using Hull City Council's local social value framework and central guidance from NHS England around social value in NHS commissioning we engaged key decision makers, commissioners and service providers in a discussion around their current understanding and application of social value measures.

We identified what currently worked well and what worked less well, and looked at how we could maximise local, skills, experience and knowledge to embed a common framework across a public sector partnership.

HOW DID THE CASE STUDY GENERATE SOCIAL VALUE?

A common social value framework

We conducted desk top research and held meetings with key public sector organisations and concluded that while organisations have a strong commitment to the principles of social value they each interpreted its meaning and application differently

We engaged with the following key stakeholders in our discussions:

- ❖ *Strategic leaders*
- ❖ *Commissioning and procurement leads in public sector organisations*
- ❖ *The local voluntary and community sector*

Although central guidance had already been issued to Local Authorities and NHS bodies, the documents seemed to cause a lack of consensus. We hoped to foster a more joined up and consistent approach that would work in a partnership context. To achieve this, we undertook a review of existing work on social value with the aim of drawing out the most successful framework elements. We intended to reconfigure them into a single common social value framework which could be shared across the stakeholders involved.

A single common social value framework is easy to:

- ❖ *Understand*
- ❖ *Implement*
- ❖ *Monitor*

Across the public sector

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Developing a common social value framework was recognised as a priority as it would enable the co-commissioning agenda to be driven forward. It was also considered that the framework could work to reduce any confusion experienced by partners regarding what might be described as social value measures. We believe that uncertainty over how best to respond to the social value ask throughout commissioning and procurement processes is a key concern for bidders.

The new social value framework was based on existing work undertaken by Hull City Council. They had devised a social value *menu* for commission to select the social value measure most appropriate to their requirements. The menu acted to provide an effective definition of what was meant by social value in the relevant context, and it went further by providing examples of how the social value could be achieved and measured. This clear approach was attractive to commissioners and encouraged them to adopt the social value menu as part of their processes.

In developing the new social value framework the menu of options has been reviewed and updated after consultation with public sector organisations. The organisations demanded greater flexibility regarding the measures available through the menu due to their differing social value requirements. It was also noted that the measures needed to remain appropriate and proportionate to the service being commissioned.

Monitoring the impact

Our common approach to social value and resulting framework, provides a tangible and flexible menu of social values options which we consider can be used to support the implementation and monitoring of our work.

The Social Value measures selected from the menu inform the key social value performance measures relevant to the contract at hand. Due to their clear description, social value evidence can be captured more effectively, offering better integration into the contract management process.

This new found clarity can enable both commissioners and providers to understand what evidence is being gathered and why. Our common view of social value is that it should be a *part* of the process rather than in *addition* to the process. Moreover, we recognise that implementing our framework and gathering

proportionate evidence offers a level of strategic assurance, as it clearly demonstrates how social value is being applied across the partnership.

WHO ARE THE CASE STUDY PARTNERS?

NBF, Hull City Council and NHS Hull Clinical Commissioning Group

WHAT HAS BEEN THE IMPACT?

The potential to make a difference

The draft framework served as a useful starting point to trigger social value conversations with organisations such as the Fire and Rescue Service, who acknowledge their social value obligations but require support to understand how to apply it. Our new social value framework has the potential to make a real difference to those who need it most.

WHAT HAVE BEEN THE KEY AREAS OF SUCCESS?

Ongoing commitment

The key success of this work has been the ability to engage a wide range of local stakeholders in a pro-active conversation around social value. We have also been able to establish an ongoing commitment to continue our work beyond the lifetime of this case study.

There is a local enthusiasm to turn strategy into action.

WHAT HAS BEEN LEARNT?

Social value: The right thing to do

Our learning to date:

- ❖ There is no common definition among public sector organisations of what social value means and no consensus over how this question is best evidenced as part of the tender process.
- ❖ An uncertain financial climate and key policy drivers around co- and joint commissioning has deepened the need for a negotiation of a flexible, requirements led social value framework.
- ❖ The public sector recognises that social value frameworks should be flexible and proportionate to the services being commissioned, and realistic about what can be achieved.
- ❖ There is strong evidence that cultural barriers and current ways of working need to be pro-actively challenged in order to reach consensus on a common definition of social value and measurement approach.
- ❖ Further work is required to identify how social value impact measurement can be embedded in current contract monitoring and reporting processes.
- ❖ There is an appetite from the local voluntary and community sector to contribute to a menu of social value options, based on what they provide. Additionally, the voluntary and community sector has suggested greater clarification in procurement and tender documents around which social value measures are included within a specification.

Our case study revealed a positive social value phenomena – *accidental social value*

We came across some public sector organisations who were undertaking work that achieved *accidental social value*.

Example

- ❖ A community based contact from the Humberside Fire and Rescue Service demonstrated that they were undertaking significant activity in addition to their statutory role.
- ❖ They did this because they believed that, “It was the right thing to do”.

This told us that not all organisations understood the extent of their social value commitment

Our future commitment

- ❖ We are in the process of developing a pilot Social Value Assurance Framework which we will test with upcoming planned procurement exercises with the Local Authority and NHS Hull Clinical Commissioning Group.
- ❖ We will use the learning to date to produce a local guide to social value aimed at our public and voluntary and community sector partners. This will be circulated across our existing networks and partnerships. Plus it will accompany our existing commissioning plans and strategies, particularly those focused on co-commissioning opportunities.
- ❖ We will work closely with commissioning and procurement leads in order to support them in embedding social value as a core element of their work, including ensuring that social value reporting is included in monitoring and contract management processes.
- ❖ We will work closely with the voluntary and community sector in order to help them evidence their social value outcomes better, increasing their capacity and capability for delivering services in the future.
- ❖ We will work with all public sector partners to ensure that they recognise and highlight the social value they already achieve as part of their routine business.

WHO CAN I CONTACT?

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FURTHER INFORMATION OR LINKS

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