

OUR MISSION WALTHAM FOREST

SOCIAL VALUE POLICY 2025-2027

London Borough of Waltham Forest

This document outlines the Social Value Policy for the London Borough of Waltham Forest for the period 2025-2027. It emphasises the commitment to a fair, inclusive, and sustainable community by improving upon the previous policy and aligning with strategic frameworks and legislative requirements. The policy aims to enhance residents' well-being while promoting local economic growth, social inclusion, and environmental sustainability.

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1. Delivering Social Value Through Smarter Spending

Waltham Forest Council is committed to using public funds to generate meaningful, long-term benefits for our residents. Building on the success of our 2021–2025 Social Value Policy, this updated 2025–2027 policy strengthens our approach to ensure that every pound spent delivers real value for the borough.

This policy guides how we procure goods, services, and works—ensuring that every contract supports local employment, empowers communities, and promotes environmental sustainability. Since 2021, we have significantly enhanced our commissioning and procurement processes to embed social value at every stage.

Our goal is to enhance the economic, social, and environmental wellbeing of Waltham Forest. Through strategic investment, we are working to create a fairer, greener, and more inclusive borough.

2. Alignment with National Policy and Legislation

This policy aligns with key national frameworks, including:

- **Procurement Policy Note (PPN) 02/21**
- **National Procurement Policy Statement (NPPS)**
- **Procurement Act 2023**

These frameworks emphasise the importance of embedding social value into public procurement to reflect the needs and priorities of local communities.

In Waltham Forest, social value is not limited to procurement. It is embedded across the entire project lifecycle—from early planning and design through to delivery and evaluation. This holistic approach ensures social value is a core principle, not an add-on, shaping how we plan, deliver, and measure success.

3. Defining Social Value in Waltham Forest

Social value refers to the additional economic, social, and environmental benefits generated through public sector activities—beyond the core purpose of a contract or service. It includes:

- Enhancing community wellbeing
- Developing social capital
- Protecting and improving the environment

In line with the updated **Social Value Model (PPN 002, 2025)**, social value is now a structured and measurable component of public procurement. Relevant outcomes

and award criteria are selected to reflect local priorities and are evaluated alongside cost and quality.

Waltham Forest Council applies this model across the full project lifecycle, embedding social value from planning through to delivery and evaluation.

4. Social Value Thresholds

To ensure consistency and impact, the Council has established minimum social value requirements:

- **Works Contracts:** A minimum **10% weighting** for social value applies to all contracts valued at **£500,000 and above**.
- **Goods and Services Contracts:** A minimum **10% weighting** applies to all contracts valued at **£172,000 and above**.
- **Contract Extensions and Direct Awards:** The same **10% minimum weighting** applies, ensuring social value is embedded across all procurement routes.

This approach ensures that every eligible contract contributes to our social, economic, and environmental objectives.

5. Embedding Social Value: Frameworks, Metrics, and Accountability

Waltham Forest Council is committed to embedding social value across all procurement and contract management activities. Since adopting the **National TOMs (Themes, Outcomes, and Measures) Framework** in 2019, the Council has aligned its approach with the **National Procurement Policy Statement (NPPS)** and the **Procurement Act 2023**, which came into effect in February 2025.

To ensure that social value delivery reflects local priorities, the Council has partnered with the **Social Value Portal** to develop a **bespoke Waltham Forest TOMs Framework**. This tailored model enables the Council to measure and manage social value in a way that is **locally relevant, outcomes-focused, and strategically aligned**.

Implementation Approach

- **Integration Across the Lifecycle**
Social value is embedded at every stage of the procurement process—from early planning and specification through to contract award, delivery, and evaluation.
- **Training and Capacity Building**
Contract managers receive targeted training to support the application of the

bespoke TOMs Framework, in line with the NPPS and **Public Procurement Notice (PPN) 002: The Social Value Model**.

- **Digital Measurement and Reporting**
The Council uses the **Social Value Portal** to monitor, measure, and report on supplier contributions. This ensures transparency, consistency, and accountability in how social value is tracked and communicated.
- **Annual Reporting**
Progress against defined social value objectives is published annually, reinforcing transparency and enabling community engagement.
- **Measurement and Evaluation**
The Council uses comprehensive metrics aligned with the **2024 National TOMs Framework** and the **bespoke Waltham Forest TOMs** to evaluate the social, economic, and environmental impact of supplier commitments. These standardised and locally tailored metrics provide a transparent and consistent benchmark for assessing social value across all projects and initiatives.
- **Oversight and Resourcing**
To support effective oversight, a **management fee** is applied to suppliers. This fee covers the costs associated with monitoring, evaluating, and reporting social value outcomes, and ensures the Council can maintain the integrity and rigour of its assessment processes.

6. Benefits for Residents, Businesses, and Communities

The Council's adoption of the **National TOMs Framework**, aligned with the **National Procurement Policy Statement (NPPS)** and the **Procurement Act 2023**, ensures that social value is embedded in procurement to deliver tangible, measurable benefits across Waltham Forest.

This approach supports the Council's ambition to build a **fairer, greener, and more inclusive borough**, delivering:

- **Improved Community Wellbeing:** Enhanced access to employment, training, and essential services.
- **Stronger Local Economy:** Support for local suppliers and SMEs to drive inclusive growth and resilience.
- **Inclusive Economy:** Targeted interventions to reduce inequality and ensure fair access to opportunities for all residents.
- **Environmental Sustainability:** Promotion of low-carbon, resource-efficient practices that protect and enhance the local environment.
- **Resident Engagement:** Procurement aligned with local needs through meaningful community input and feedback.
- **Reduced Inequality:** Fairer access to opportunities and targeted support for underrepresented and disadvantaged groups.

7. Key Performance Indicators (KPIs)

To ensure accountability and continuous improvement, the Council will monitor and report on social value delivery using clear, outcome-based **Key Performance Indicators (KPIs)** across three priority areas:

Economic Development

- Prioritisation of local suppliers and social enterprises
- Job creation and retention
- Apprenticeship and training opportunities
- SME engagement and growth

Social Inclusion

- Promotion of equality, diversity, and accessibility
- Targeted support for underrepresented groups
- Community wellbeing and cohesion outcomes

Environmental Sustainability

- Adoption of low-carbon, circular economy practices
- Emissions reduction and energy efficiency
- Biodiversity enhancement and green space protection

These KPIs are aligned with the **bespoke Waltham Forest TOMs Framework** and will be used to assess supplier performance, inform contract management, and drive continuous improvement.

8. Defining ‘Local’ in Waltham Forest: A Targeted Approach

All social value commitments must be **locally relevant** and deliver **measurable, long-term benefits** for Waltham Forest’s residents, businesses, and communities.

- A **Local Person** is defined as an individual residing within the geographical boundaries of the **London Borough of Waltham Forest** at the time of their employment application related to the contract.
- A **Local Business** is defined as a business operating from premises within **Waltham Forest** or neighbouring boroughs—**Newham, Enfield, Haringey, Redbridge, Hackney, and Epping Forest District Council**—provided they are located within the **M25**.

Organisations delivering social value must ensure their initiatives are **responsive to local needs**, supported by:

- Regular evaluation and community feedback
- Alignment with the Council’s **Essential Criteria**
- A focus on sustainability, inclusivity, and long-term impact

Social value initiatives should be designed to **leave a legacy**, contributing to a **stronger, fairer, and greener Waltham Forest**.

9. Contract Management and Enforcement

The delivery of agreed social value commitments is a **contractual requirement** for all suppliers engaged by the London Borough of Waltham Forest. These commitments are integral to the Council's procurement strategy and are monitored with the same rigour as other contractual obligations.

The Council acknowledges that delivery challenges may occasionally arise. In such instances, a **collaborative and solutions-focused approach** will be adopted to support suppliers in meeting their commitments.

Where underperformance is identified, suppliers will be required to:

- Submit a **formal rectification plan** detailing the steps they will take to address the shortfall.
- Where necessary, propose **revised or alternative social value activities**. These alternatives must:
 - Be of **equal or greater value** than the original commitment.
 - Align with the **intended social, economic, or environmental outcomes** of the relevant service area.
 - Be subject to **Council approval** through the contract management process.

In appropriate cases, suppliers may be invited to make a contribution to the **Social Investment Fund** as an alternative means of delivering community benefit.

This approach ensures that social value delivery remains **enforceable, adaptable, and impactful**, while maintaining accountability and supporting continuous improvement in supplier performance.

The **Social Investment Fund (SIF)** is a strategic mechanism established by the London Borough of Waltham Forest to address complex social and economic challenges across the borough. It is designed to mobilise financial contributions from suppliers, developers, and investors to support initiatives that deliver **needs-led, community-focused social value**.

The Fund enables the Council to go beyond traditional planning obligations by creating a flexible and responsive vehicle for delivering long-term, measurable benefits for residents and communities. It supports projects that:

- Tackle entrenched inequalities and social exclusion
- Promote inclusive economic growth and skills development
- Enhance community wellbeing and resilience
- Advance environmental sustainability and climate action

Contributions to the SIF may be made in lieu of under-delivered contractual social value commitments (see Section 9), provided they are of **equal or greater value** and aligned with the **intended outcomes** of the relevant service area.

The SIF is governed by clear criteria and oversight mechanisms to ensure transparency, accountability, and alignment with the Council's strategic priorities. All

funded initiatives must demonstrate **local relevance, measurable impact, and long-term sustainability**.

10. Performance Monitoring and Remedies for Social Value Delivery

The London Borough of Waltham Forest is committed to ensuring that all agreed social value commitments are delivered in full over the life of each contract. These commitments are legally binding and form a core part of the Council's procurement and contract management framework.

While the Council supports a collaborative approach to delivery, it reserves the right to apply formal remedies where performance falls below acceptable standards. To ensure accountability and enable early intervention, the following performance thresholds will apply:

Remedial Measures

Where commitments are not met, and no acceptable alternative is agreed, the Council may apply one or more of the following remedies (or such other contractual remedies that may apply):

- **Liquidated damages** – where the right to charge a genuine pre-assessment of loss for non-delivery of the social value has been included in the contract
- **Withholding of final payments** – where the right to withhold or set off has been included in the contract or may otherwise be exercised as contractual damages for breach of contract
- **Exclusion from future procurement opportunities** – where to exclude is lawfully possible as a discretionary exclusion ground under the Procurement Act 2023
- **Public disclosure of non-compliance** – where to disclose is reasonable and proportionate

These remedies may also apply where a supplier fails to deliver on any agreed alternative remedy, including contributions to the **Social Investment Fund** (see Section 10).

The decision to apply, waive, or modify remedial measures rests solely with the Council and will be based on the specific circumstances of each case.

The Council encourages **early and ongoing engagement** between suppliers, internal teams, and external delivery partners. Meaningful engagement with local communities is essential to ensure that social value initiatives are aligned with borough priorities and deliver tangible, lasting benefits for residents.

11. Conclusion

The Social Value Policy (2025–2027) reaffirms the London Borough of Waltham Forest's commitment to leveraging its full range of commissioning, investment, and

partnership activities to deliver long-term, inclusive, and measurable benefits for the borough.

By embedding social value across the entire project and contract lifecycle—from early planning and design to delivery and evaluation—the Council ensures that all public-facing activity contributes to a **fairer, greener, and more inclusive Waltham Forest**.

This policy is not solely a procurement framework—it is a strategic commitment to social justice, environmental stewardship, and economic resilience. Through collaboration with suppliers, developers, investors, and community partners, Waltham Forest will continue to lead by example in delivering public value that lasts.