



Embedding Social Value in Southampton's Planning Policy

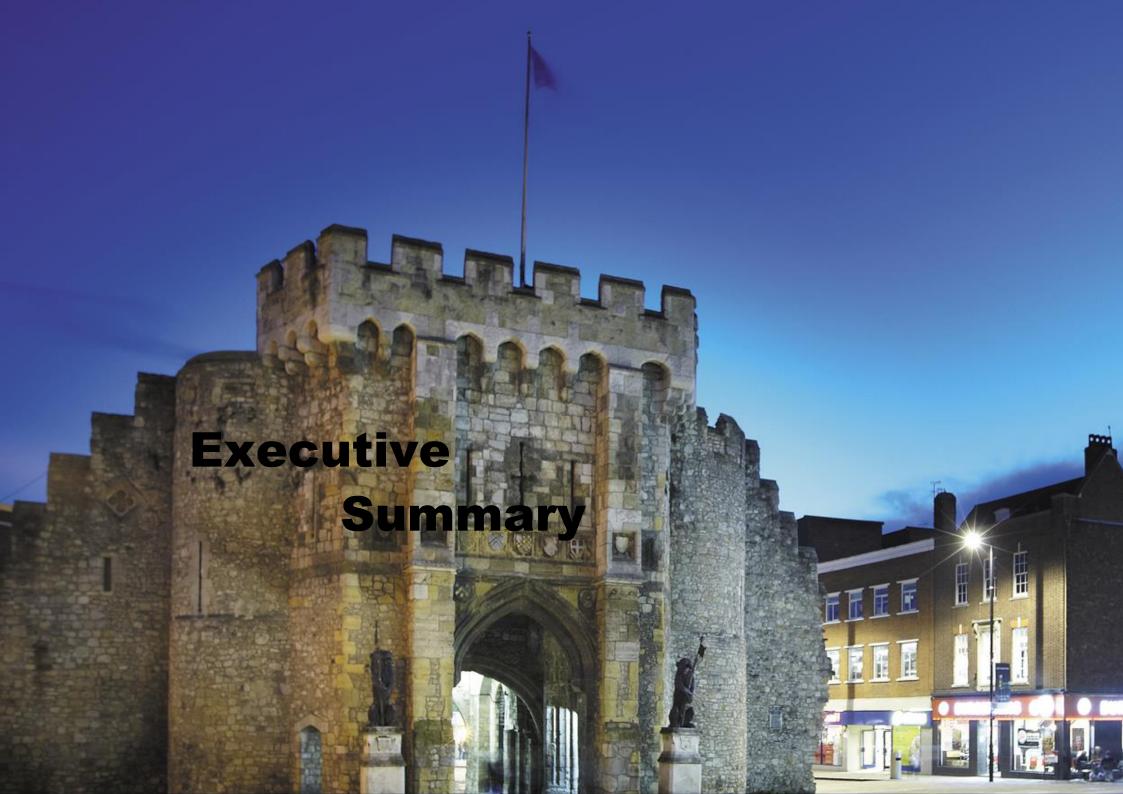
Recommendations document

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Prepared by the Social Value Portal for Southampton City Council

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Executive summary

At present, social value is not being accounted for during the planning process in Southampton and as a result, the local community are being denied the additional social benefits that would otherwise accrue if developers were asked to focus on maximising the wider contribution a development can bring to society. In the year ending December 2021, Southampton received 25 major planning applications, which if social value is embedded in the planning process, would have contributed significantly to improving outcomes for local people and creating better places to live and work.

Missing the opportunity to unlock social value through major developments, makes little sense especially as we emerge from the pandemic when it will be even more important for the planners and developers to work more closely together to see how they can support the levelling up of communities, build back better, greener, and fairer.

Over spring 2022, Social Value Portal (SVP) carried out a Local Needs Analysis and Social Value Scoping Study to understand the social value priorities for Southampton as well as the current policy context. This work informed the creation of a place based Social Value Measurement Framework for Southampton which can be viewed in full in Appendix 1 and summarised in Section 3.1.

The purpose of this document is to:

- 1. Lay out the steps Southampton City Council should take to embed social value in planning policy and bring in the requirement for a Social Value Statement with all major new planning applications
- 2. Provide a place-based Social Value Measurement Framework for Southampton to be used as the basis for social value strategies submitted with major planning applications
- 3. Outline the key steps which should be taken to ensure developers have the necessary information to respond effectively to the new requirements for a Social Value Statement

This document shows Southampton City Council are in a strong position to unlock social value through the planning system. By following the recommendations laid out by SVP, new development in Southampton will embed social value from the outset and deliver better outcomes for local people throughout the development lifecycle.



1. Social value in planning policy

The planning system presents a key opportunity to unlock social value through new development as National and local planning policy provide a permissive environment to which social value can be included as a key requirement in planning.

It is therefore vital that the planning policy context is utilised effectively to unlock social value through new development, and ensure developments will continue to create social value long term.

1.1 What is Social Value?

Social value is a measure of the contribution that an organisation and its supply chain make to society. It is defined within the Public Services (Social Value) Act 2012¹ as the 'economic, social and environmental wellbeing' that is created by a service (or development) and is delivered as both direct and indirect outcomes or benefits arising from an intervention over a period of time. The social value that can be delivered through new development is maximised where social value is embedded as the golden thread, throughout the development lifecycle in the way spaces are designed, built and occupied.

The Social Value Strategy is the golden thread to maximising benefits throughout the lifecycle of the development

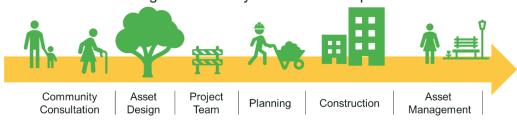


Figure 1: Social value is the golden thread to maximising benefits throughout the lifecycle of a development.

1.2 The Social Value Act

The Social Value Act requires all public bodies to look beyond the financial cost of a contract and consider how the services they commission and procure might improve an area's economic, social, and environmental wellbeing. The Act provides a significant precedent and has transformed the relationship between the public sector and its suppliers and whilst the Act itself does not cover planning, the outcomes and objectives are exactly the same; to help our communities thrive and flourish.

More recently, the principles of the Social Value Act have been reinforced by *Procurement Policy Note PPN06/20*² and, more importantly for real estate, the Construction Playbook which sets out key policies and guidance

¹ The Public Services Social Value Act 2012: www.legislation.gov.uk/ukpga/2012/3/enacted

 $^{^2}$ Procurement Policy Note 06/20 – taking account of social value in the award of central government contracts - GOV.UK (www.gov.uk)

for how public capital works, projects and programmes are assessed, procured and delivered.

1.3 Embedding Social Value in Planning

Despite the success of the Social Value Act in procurement, and that planning was explicitly mentioned Civil Society Strategy 2018³, the movement to embed social value into planning has only recently gained momentum. The Social Value Planning Taskforce⁴ (SVPT) formed in November 2020 as a sub-group of the National Social Value Taskforce to consider how social value could be integrated into the planning process and to propose practical steps that could be taken by both the planning community and developers.

The SVPT comprises of 40 active members from the private and public sector, working together to ensure social value is embedded in planning in a way that works for all stakeholders and has community benefits at the centre.















































































³ Civil Society Strategy: building a future that works for everyone - GOV.UK (www.gov.uk)

⁴ https://www.nationalsocialvaluetaskforce.org/sv-in-planning

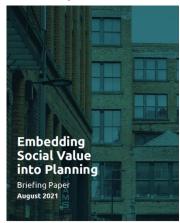
A key output from the SVPT was the Embedding Social Value into Planning Briefing Paper⁵ which launched in August 2022 and provided:

- Clear guidance for councils on the options they have available to embed social value into planning policy in the short term, before the development of a Local Plan
- Policy Guidance for the planners on how to embed social value into the Local Plan
- Guidance for developers on how they can use the National Planning Policy Framework (NPPF) to submit a Social Value Statement and ensure it is taken into account as part of the planning submission
- Examples of best practice to illustrate the progress is being made by both developers and local planning authorities

Since the launch of this document, many councils have made further progress to embed social value in their planning policy (see <u>Section 2.0</u>), and an unprecedented number of developers have been choosing to submit



The findings from the SVPT are significant in terms of what can be levered using the existing policy context and have the potential to unlock material benefits for communities.





1.4 The National Planning Policy Framework

At a statutory level, the combination of the National Planning Policy Framework⁶ (NPPF) and the Health and Social Care Act 2012⁷ provide the necessary permissions and rationale for planning authorities to request a Social Value Statement.

Social value is already integrated within national guidance and this filters through to local authorities through the National Planning Policy Framework (NPPF). This has been a part of National Policy since 2012 and puts the achievement of 'Sustainable Development' as a golden thread running throughout the operation of the planning system.

The NPPF sets out three core dimensions of what constitutes 'Sustainable Development', and these are completely aligned with the aims behind the Social Value Act:

- Economic building a strong, responsive and competitive economy, by
 ensuring that sufficient land of the right type is available in the right
 places and at the right time to support growth and innovation.
- Social supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality-built environment, with accessible local services that reflect the community's needs and support its health, social and cultural well-being.
- Environmental contributing to protecting and enhancing the natural, built and historic environments; the prudent use of natural resources, the minimisation of waste and pollution, and adapting to a low carbon economy.

⁵ Embedding Social Value into Planning Briefing Paper: https://socialvalueportal.com/resources/video/measurement-implementation/nsvc22-on-demand-embedding-social-value-into-planning

⁶ The National Planning Policy Framework:

assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/81019 7/NPPF_Feb_2019_revised.pdf

⁷ The Health and Social Care Act 2012: www.legislation.gov.uk/ukpga/2004/5/contents

Importantly, the NPPF notes that these three dimensions are mutually dependent. Economic growth for example can secure higher social and environmental standards, and well-designed buildings and places can improve the lives of people and communities. Therefore, to achieve sustainable development, economic, social and environmental gains are to be sought jointly and simultaneously through the planning system.

A core principle of the NPPF states:

"Planning should take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs."

It is therefore clear from the above that social value is already integrated within national guidance and that this filters through into local authority development plans through an explicit requirement for Sustainable Development.

1.5 Using the National Context

Using the planning context provided by the NPPF, a Social Value Statement can then be considered through the planning process to explain how the development meets the principles of sustainable development (which holds the same definition as social value) and responds to the relevant area's Joint Strategic Needs Assessment (JSNA). However, further steps to embed social value in planning policy are recommended to bolster this statutory positioning which are laid out in <u>Section 4.0</u>.



2.0 Embedding Social Value in Planning Policy Good Practice

Several councils have already taken the necessary steps to embed social value in their planning policy in order to unlock benefits for their communities that would otherwise be missed. For councils who are well placed to update their Local Plan, such as Ashfield and Salford, social value has been embedded as a policy within the Local Plan. Where this is not yet possible due to Local Plan timelines, councils such as Southwark and Bristol have chosen to add social value to the Validation Checklist and Developer Guidance⁸ as a short term intervention.

2.1 Salford City Council

Salford City Council have updated their Local Plan to include a Social Value Policy which will ensure that new development takes all practicable measures to maximise its wider contribution through social value and social inclusion. *The Publication Salford Local Plan: Development Management Policies and Designations* was submitted to the Secretary of State for examination in June 2021 and examination hearings followed in December 2021. During the examination, the need for further Main and Additional modifications was identified, these were published on 30 May 2022 and comments are being invited on these until 11 July 2022⁹.

All development shall be located, designed, constructed and operated so as to maximise its social value and contribution to making Salford a more socially inclusive city.

All major developments shall submit a Social Value Strategy at the planning application stage for the approval of the city council. A condition will be included on all relevant planning permissions to ensure the implementation of any approved Social Value Strategy, including requiring compliance with the relevant parts of the strategy to be confirmed prior to the commencement and the occupation of the development. The Social Value Strategy shall identify how the development will support social inclusion and deliver social value throughout its lifecycle. This shall include demonstrating how the development will maximise its positive contribution to:

- Reducing inequalities in Salford and their adverse impacts on residents;
- The ability of local residents and vulnerable groups to fully participate in society;
- Inclusive places, in accordance with Policy F3;
- Economic inclusion, in accordance with Policy EC2; and

Good mental and physical health, in accordance with Policy HH1.

For the purposes of this policy, social value is defined as the range of potential social, economic and environmental benefits to communities in Salford, including existing residents, businesses and other stakeholders in the local area

Policy F2: Social value and inclusion

⁸ Building Bristol Guidance for Planners

⁹ There were no major modifications to *Policy F2 – Social value and inclusion*, and adoption of the Local Plan and this policy is expected in the Autumn.

2.2 London Borough of Southwark

In Southwark, a new Local Plan has been recently adopted which does not include social value. However, to ensure social value is still embedded in planning, a Social Value Statement describing 'the economic, social and environmental impacts of the development, how the development will contribute to the long-term wellbeing and resilience of existing and future residents and businesses' is due to become a validation requirement for major and strategic applications.

The Social Value Statement should take into account feedback gathered from the community and which reflects the diversity and demographics of the local area. This requirement is laid out within their Development Consultation Charter¹⁰ which includes the description to the right.

Best Practice Example

Development Consultation Charter London Borough of Southwark

"A Social Value Statement. This should describe the economic, social and environmental impacts of the development, how the development will contribute to the long-term wellbeing and resilience of existing and future residents and businesses. This should take into account feedback gathered from the community and which reflects the diversity and demographics of the local area."

¹⁰ Southwark Council development Consultation Charter, 2021: https://www.southwark.gov.uk/planning-and-building-control/planning-policy-and-transport-policy/consultation-and-updates/statement-of-community-involvement

2.3 **Ashfield District Council**

Ashfield District Council's Social Value Policy¹¹ sets out the Council's commitment to social value and the added benefits that can be gained from projects and public procurement.

Examples of delivering social value in the Policy includes 'Building Social Value into planning services'. This has been reflected with the inclusion of a social value in the Ashfield District Council Draft Local Plan 2020-203812 which is intended to bring the greatest socio-economic benefit to Ashfield over the next 17 years.

The Council have been involved with the SVPT in the development of the policy approach which includes social value within Strategic Policy S1: Achieving Sustainable Development, and Policy SD1: Social Value which can be seen to the right.

¹¹ Ashfield District Council Social Value Policy: https://www.ashfield.gov.uk/media/hdlmtotl/socialvalue-policy.pdf n

Best Practice Example

Local Plan Social Value Policy Ashfield District Council

Policy SD1: Social Value

All development in Ashfield will maximise social value in order to deliver as many public benefits as possible. All major developments will be required to submit a Social Value Strategy (SVS) demonstrating how social value is achieved throughout the lifecycle of the development.

The SVS will need to demonstrate how the development contributes positively to:

- 1. Placemaking
- Health and wellbeing
- Local employment, regeneration and growth,
- Community resilience, and
- 5. Safeguarding the environment and responding to climate change Further detail about the SVS will be clarified by a Social Value Supplementary Planning Document.

Evidence base

- Sustainability Appraisal, August 2021. Wood Group UK Ltd.
- Ashfield Social Value Policy, 2020. Ashfield District Council
- Ashfield Health and Wellbeing Partnership Strategy Be Healthy, Be Happy, 2021 – 2025 Ashfield Health and Wellbeing Partnership.
- Ashfield Community Partnership Strategic Plan 2019-2022
- Ashfield Community Partnership Strategic Assessment 2019-2022 National Planning Policy and Guidance
- NPPF 2019, Part 2: Achieving sustainable development.

¹² Ashfield District Council Draft Local Plan 2020-2038: www.ashfield.gov.uk/media/imjbbq1y/ashfield-draft-local-plan-2020-2038.pdf

2.4 **Good Practice Recommendations**

The examples provided in this chapter highlight that there two key approaches which can be taken by local planning authorities to create the planning policy context where Social Value Statements can be required in planning. The most suitable approach to take action now will depend on the Local Plan timelines, as well as the social value priorities of the council.

The following chapter sets out the local planning policy context and the local needs and priorities of Southampton. The local context informs the specific recommendations for embedding social value in planning policy for Southampton set out in <u>Section 4.0</u>.



3.0 Local context

The Local Needs Analysis identified the local needs and priorities for creating social value in Southampton. Key data and information that inform this needs analysis includes data from the English Indices of Multiple Deprivation (IMD), an analysis of public datasets as well as engagement with DWP who are a strategic partner of Southampton City Council. The Social Value Scoping Study was carried out to establish the current policy context in Southampton in relation to social value objectives.

Key findings from the Local Needs Analysis and Social Value Scoping Study have been mapped against the Social Value Measurement Framework in <u>Appendix 1.0</u>, and can be viewed in full in the Southampton City Council Local Needs Analysis and Social Value Scoping Study report (June 2022).

3.1 Southampton's Social Value Measurement Framework

The Social Value Measurement Framework for Southampton has been built around the National Social Value Measurement Framework¹³ (known as the National TOMs – Themes, Outcomes and Measures) that is widely used across the public and private sectors. In addition, the issues raised within the Local Needs Analysis as well as the priorities identified through the Social Value Scoping Study have shaped the framework which includes 5 bespoke Themes, 14 associated outcomes and 52 Measures which specifically relate to local social value priorities.

Table 1 overleaf sets out the Themes and Outcomes in full. Each Outcome is supported by a number of Measures, each of which is allocated a financial value to make it possible to calculate the social value created in financial

terms. These values have been developed using publicly available data such as the Unit Cost Database and are HM Treasury Greenbook Compliant. A full list of the Measures that support the Themes and Outcomes can be found in <u>Appendix 1.0</u> along with an outline of how they align to local needs and priorities.

¹³ The complete National TOMs Framework and guidance which includes detailed rationales for all proxy values can be downloaded here: https://socialvalueportal.com/national-toms/.

Table 1: Themes and Outcomes

THEMES

OUTCOMES

Jobs: Provide accessible jobs for residents of Southampton

Growth: Support economic growth in Southampton to become a green and environmentally sustainable city

Social: Promote the health and wellbeing of all Southampton residents

Environment: Decarbonise and improve the environment in

Innovation Promoting social innovation

Southampton

- Reduce the need for residents to commute for employment opportunities
- Provide more local employment opportunities in deprived areas¹⁴
- Support disadvantaged groups into employment and training
- Improve local skills and attainment
- Support the growth of local companies including micro and small organisations
- Improving staff wellbeing and mental health
- Support the growth of the green and responsible economy
- Improve community safety and reduce fear of crime
- Reduce inequalities in health, supporting the most deprived areas (such as Redbridge, Bevois, Freemantle and Harefield)
- More working with the community
- Promote sustainable energy and carbon reduction
- Encourage active travel
- Protect and enhance the natural environment
- Promote sustainable waste management

Other measures (TBD)

3.2 **Applying the Southampton Social Value Measurement Framework to Major Developments**

Once social value is embedded in planning policy at Southampton, developers can be required to submit a Social Value Statement as part of the planning application.

A Social Value Statement aims to outline the Social Value Strategy for the project and how this aligns with the key community needs and priorities of the local area. At its core, a Social Value Strategy ensures these needs are met in a structured and efficient way throughout the lifetime of a development against measurable outcomes.

The Social Value Statement and associated strategy should be informed by or aligned to the Southampton Social Value Measurement Framework. Targets can be set alongside measures within the Framework, and an overall social value commitment (£) can be presented for the scheme. Further detail on the development of a Social Value Statement can be found in Section 5.1.2.

3.3 The Social Value Opportunity in Southampton

Southampton receives 25 major planning applications a year¹⁵, presenting a significant opportunity to unlock social value if developers are asked to focus on maximising the wider contribution a development can bring to society. Not only will this generate better outcomes for local people, it will also help to rebuild trust in the planning process and give local communities a key opportunity to feed into a key strategy within planning applications.

¹⁴ Redbridge, Bitterne and Bevois

¹⁵ Based on data from the year ending December 2021

4 Key Recommendations for Southampton's Planning Policy

4.0 Key Recommendations for Southampton's Planning Policy

This chapter sets out the key recommendations for embedding social value in the new Southampton Local Plan which is the most robust approach to unlocking social value through the planning process. For Southampton, the current development of a new Local Plan presents a key opportunity to embed social value in this forthcoming policy, similarly to the approaches taken by Salford City Council, Ashfield District Council as outlined in <u>Section 2.0</u>.

However, if due to time constraints, this is not possible we have also provided recommendations for the intermediary solution of a Social Value Policy update.

Whether social value is embedded in the new Local Plan, or the intermediary solution is taken, either step should be bolstered by the inclusion of a Social Value Statement in the Validation Checklist. Both of these routes are set out in Figure 2 to the left and explained in more detail within this chapter.

Reccomended approach to unlocking social value through planning

Embedding social value in the Local Plan

Evidence base:

NPPF 2021: Part 2 – Achieving Sustainable Development

Local policies (<u>see Section</u> 4.1.2)

Intermediate approach to unlocking social value through planning:

Creating a council wide Social Value Policy to cover both procurement and planning

Evidence base:

Joint Strategic Needs Assessment and Health and Social Care Act (see Section 4.2.1)

Validation Checklist

Updated to include a Social Value Statement as a validation requirement

Social value unlocked through all major developments

Figure 2: Flow digram for embedding social value in Southampton City Council's planning policy (recommended and alternative solution)

Draft Example

Local Plan Social Value Policy Southampton City Council

4.1 Recommended Approach: Local Plan Social Value Policy

In Southampton, the Local Plan presents the most significant opportunity to embed social value, considering the new Local Plan is currently going through the plan making process to ensure the plan tackles current issues and sets a clear and aspiration vision of Southampton.

Embedding social value in the Local Plan which forms part of the statutory development plan, represents the most robust way of ensuring that social value is addressed through the planning and development process and delivered after planning is approved¹⁶. It can be used to provide specific additional local requirements that development teams can respond to.

For Southampton City Council to ensure new development contributes to addressing priority areas, social value should be embedded in the Local Plan in the form of a Social Value Policy. This policy should:

- Clearly sets out the requirement to developers
- Provide the evidence base for this requirement
- · Include guidance for developers to respond to

4.1.1 Developer Requirement:

SVP have drafted the Local Plan Social Value Policy to the right, which can be included in the new Local Plan to ensure the a Social Value Statement is embedded as a requirement for all major new developments.

Southampton Policy: Social Value

All planning applications for major new developments must include a Social Value Statement demonstrating the developers understanding of local needs and commitment to addressing these through measurable criteria.

This should be informed by or aligned to the Southampton Social Value Measurement Framework, addressing the following themes and their associated outcomes (see Table 1):

Jobs: Provide accessible jobs for residents of Southampton

Growth: Support economic growth that contributes to Southampton becoming a green and environmentally sustainable city

Social: Promote the health and wellbeing of all Southampton residents

Environment: Decarbonise and improve the environment in Southampton Evidence base

¹⁶ Embedding social value into planning briefing paper: https://socialvalueportal.com/resources/guide/social-value-enhancement/social-value-in-planning-paper/

4.1.2 **Evidence Base**

An evidence base is essential in order to develop any new policy. The evidence base for the Local Plan Social Value Policy is provided by the following key policy documents:

- Southampton City Council Green City Plan 2030
- Local Plan/ Adopted Development Plans
 - City Centre Area Action Plan 2015
 - Amended Core Strategy 2015
 - Amended Local Plan 2015
- Social Value and Green City Procurement Policy (and associated framework)
- Southampton City Vision Sustainability Appraisal Scoping Report 2019
- National Planning Policy Framework 2021: Part 2 Achieving Sustainable Development

In addition, the Southampton City Council Local Needs Analysis and Social Value Scoping Study (Social Value Portal, June 2022) demonstrates how these policy documents align to the Southampton Social Value Measurement Framework. Key policy objectives are mapped against the Framework in Appendix 1.0.

4.2 **Intermediary Approach: Embedding Social** Value in Broader Council Policies

If social value is not embedded in the new Local Plan, there are alternative steps that can be taken to embed social value prior to the next Local Plan

iteration. These steps are driven by local planning policy, and outlined in the following sections 4.2.1, 4.2.2.

4.2.1 **Local Planning Policy Key Drivers**

The Health and Social Care Act 2012¹⁷ was established to require the National Health Service Commissioning Board and Clinical Commissioning groups to consider the need to reduce inequalities between patients with respect to access health services when exercising their functions. The Health and Social Care Act 2012 was transformative as the primary Act to legally require action from the public sector to reduce inequalities across England. For planning authorities, the Act triggered the requirement to develop a Health and Wellbeing Strategy, underpinned by a Joint Strategic Needs Assessment (JSNA), to understand the needs in the area and how these relate to reducing inequalities.

The Planning and Compulsory Purchase Act 2004 (PCPA 2004) makes provisions relating to spatial development and town and country planning: and the compulsory acquisition of land.

Section 38(6) of the Act provides:

"If regard is to be had to the development plan for the purpose of any determination to be made under the planning Acts, the determination must be made in accordance with the plan unless material considerations indicate otherwise".

Therefore, where there are 'material considerations', then the assessment must also take into account these considerations. This means that any relevant local policies could be considered such as the council Local Employment Policy, Health and Wellbeing Strategy, JSNA or Social Value Policy. Where the policies either implicitly or explicitly refer to planning and

¹⁷ The Health and Social Care Act 2012: https://www.legislation.gov.uk/ukpga/2012/7/contents/enacted

development, then the case for considering social value within the planning process is greater.

4.2.2 A Council Wide Social Value Policy for Southampton

Based on the policy context highlighted in Section 4.2.1, as a intermediary solution prior to embedding social value in the Local Plan, a Social Value Policy can be developed to cover planning and procurement at Southampton City Council. This policy should specifically refer to the Health and Wellbeing Strategy, underpinned by the Joint Strategic Needs Assessment (England) and explicitly mention how the policy covers all aspects of the council's operations, including procurement and planning.

To structure a Social Value Policy which meets the needs of the local community, the Southampton Social Value Measurement Framework can be used to define social value.

4.3 Validation Checklist

The process of changing the Validation Checklist is subject to consultation and approval and usually takes approximately 3-6 months and should be reviewed at least every two years. Any local information requirement that is not on the list has no bearing on whether a planning application is acceptable¹⁸.

Therefore, as laid out in Figure 2, whether the recommended approach using the Local Plan or the intermediate approach through developing a council wide Social Value Policy is taken to embed social value, this should be bolstered by updating the Validation Checklist to include a Social Value Statement for certain types of development proposals.

4.4 Implementation

Once the steps laid out in this chapter have been followed, Southampton City Council will have created the planning policy context to require a Social Value Statement with major planning applications. This will ensure social value is embedded into new development, and will support developers and the council to deliver better places to live and work and address the needs of the community. To maximise the social value that can be unlocked through the planning process, Southampton City Council must work with developers and provide the necessary to support to enable them to effectively embed social value in development proposals going forward.

¹⁸ Making an application – Gov.UK



5.0 Helping Developers Unlock Social Value in Southampton

In order to for a social value to be embedded in planning policy effectively, sufficient guidance for developers should be provided to ensure the most relevant needs are being addressed and developers are equipped with the appropriate resources. Following the steps in <u>Section 4.0</u> to create the planning policy context to require a Social Value Statement with all major planning applications for new development, this chapter provides the additional steps that should be taken to support developers to unlock social value through their proposals.

5.1 Supplementary Planning Document's

Supplementary Planning Document's (SPD's) may be prepared to set out guidance for developers on the local needs of the area, how to produce a Social Value Statement and how to address measures within the Southampton Social Value Measurement Framework.

5.1.1 Local Needs Analysis

The Local Needs Analysis produced by SVP can provide a useful evidence base for developers to understand the social value priorities for Southampton. Local Needs Analysis resources should be updated regularly to account for changes in local context over time.

5.1.2 Social Value Statement Guidance

A Social Value Statement aims to outline the Social Value Strategy for the project and how this aligns with the key community needs and priorities of the local area. At its core, a Social Value Strategy ensures these needs are met in a structured and efficient way throughout the lifecycle of a development. A Social Value Statement can be submitted with the planning application to establish transparency between the local authority, the developer, the local community groups and other stakeholders.

Social Value Statement guidance should highlight the preferred or required structure of the document as well as guidance on the methodological approach. The Embedding Social Value into Planning Briefing Paper¹⁹ provides detailed guidance on the key sections for inclusion in a Social Value Statement. This includes:

- Local Needs (and Opportunities) Analysis (LNA), including a policy review and key data analysis such as Indices of Multiple Deprivation (IMD)
- Overview of the community engagement undertaken and how this has informed the Social Value Strategy
- Place-based Social Value Measurement Framework that responds to the LNA and feedback from community engagement
- Social value commitments with measurable criteria

¹⁹ Embedding Social Value into Planning Briefing Paper: https://socialvalueportal.com/resources/report/measurement-implementation/how-to-embed-social-value-in-planning

- Social Value Action Plan detailing the planned delivery against social value commitments
- Proposals for ongoing monitoring and reporting

5.1.3 Southampton Social Value Measurement Framework Guidance

Measurement Framework Guidance can be provided to explain how developers should look to use each measure relevant to the development phases (construction, estate management, occupation) as well as good practice guidance for some measures where relevant.

This can also include signposting to priority measures, and opportunities for engagement with local community programmes and initiatives. For example, partnership with DWP can be recommended to deliver against measures within the theme of Jobs.

5.2 Maximising the Social Value Opportunity

It is imperative for the council to provide guidance and resources to developers in order to support them in meeting social value requirements in planning. This way, the social value that can be unlocked through development will be maximised, relevant to the needs of the local community and clearly communicated from the outset of the development lifecycle.

The Local Needs Analysis highlighted that the needs and priorities of the community in Southampton are significant in indicators relating to jobs and skills, physical health, community safety and environmental factors. The Social Value Scoping Study demonstrated that the Council are dedicated to improving outcomes for local people. Embedding social value into planning is a key step to ensuring the council are supporting the needs of the local people through the planning process.

Based on the policy context highlighted in this document, Southampton are in an excellent position to embed social value in planning in a robust way through the new Local Plan and should utilise the opportunity presented to ensure the delivery of social value to the local community is maximised through development. If implemented, Southampton residents will benefit from a planning system that ensures development contributes to the levelling up of the area, addresses local needs and includes communities as key informants of social value strategies in their area. An opportunity not to be missed.



Appendix 1.0

The Southampton City Council Social Value Measurement Framework is build around 5 themes, 14 outcomes and 52 measures.

Outcomes	Ref 2021	Measures - Minimum Requirements	Units	Proxy Value	Needs	Policy				
	Jobs: Provide accessible jobs for residents of Southampton									
Reduce the need for residents to commute for employment opportunities	NT1	No. of full time equivalent direct local employees (FTE) hired or retained for the duration of the contract	No. people FTE	£32,445	Southampton experiences 30.4% high to severe Employment deprivation, which is 16.3% higher than the South East regional average. The wards that experience the highest levels of high to severe Employment deprivation are Redbridge (70%), Bitterne (66.7%) and Bevois (50%). The jobs density is 13% lower in Southampton than the South East regional	Environmental Assessment for the Southampton City Vision Local Plan: Key sustainability issues identified - Economic factors Lack of employment opportunities, particularly in deprived areas. High numbers of residents currently travel outside of the City for work. Encourage local employment and reduce the distance				
	NT1c	No. of full time equivalent local employees (FTE) hired or retained for the duration of the contract who are employed in your supply chain	No. people FTE	£32,445						
	NT2	Percentage of full time equivalent local employees (FTE) on contract - employed directly or through supply chain	%	Non-financial	In 2020, the number of construction jobs in Southampton was 33% below the national average and the number of jobs in the development of building projects was 45% below the national average.	People travel to work. Key sustainability issues identified - Population and Quality of Life - Unemployment rate has remained consistently higher than both regional and national rates with notable increases in 2016 and 2018 due to factors such as high dependency and low skills and attainment.				
Provide more local employment opportunities in deprived areas	NT1b	No. of full time equivalent local employees (FTE) hired or retained directly or through the supply chain for the duration of the contract who are resident in targeted areas	No. people FTE	£32,445	The wards that experience the highest levels of high to severe Employment deprivation are Redbridge (70%), Bitterne (66.7%) and Bevois (50%).					

Support disadvantaged groups into employment and training	NT3	No. of full time equivalent local employees (FTE) hired or retained on the contract who are long-term unemployed (unemployed for a year or longer)	No. people FTE	£20,429.00	The unemployment rate in Southampton aged 18 and over is 21% higher than the South East regional average. As of April 2022, claimant count in Southampton remains higher than the England and South East average, and is yet to return to pre-pandemic levels.	
	NT4	No. of full time equivalent local employees (FTE) hired on the contract who are NOT in Employment, Education, or Training (NEETs)	No. people FTE	£15,382.90	The rate of NEET (not in education employment or training) 16 and 17 year olds in Southampton is 18% higher than the South East regional average. NEETs is a priority group for the DWP and Southampton City Council Delivery Plan.	
	NT5	No. of full time equivalent local employees (FTE) aged 18+ years hired on the contract who are rehabilitating or ex-offenders.	No. people FTE	£24,269.00	The first time young offender rate is 44% higher in Southampton than the South East regional average and the reoffending rate is 26% higher.	
	NT6	No. of full time equivalent disabled local employees (FTE) hired or retained on the contract	No. people FTE	£16,605.00	Adults with mild to moderate learning disabilities is a priority group for the DWP and Southampton City Council Delivery Plan.	
	NT11	No. of hours of 'support into work' assistance provided to unemployed people through career mentoring, including mock interviews, CV advice, and careers guidance	No. hrs (total session duration)*no. attendees	£105.58	The unemployment rate in Southampton aged 18 and over is 21% higher than the South East regional average. As of April 2022, claimant count in Southampton remains higher than the England and South East average, and is yet to return to pre-pandemic levels	
	NT12	No. of weeks spent on meaningful work placements or pre- employment course; 1-6 weeks student placements (unpaid)	No. weeks	£194.50	Southampton experiences 43.2% high to severe Education deprivation which is 21% higher than the South East regional average. The wards that experience the	

	NT13	Meaningful work placements that pay Minimum or National Living wage according to eligibility - 6 weeks or more (internships)	No. weeks	£194.50	highest levels of high to severe deprivation in this domain are Redbridge (90%), Bitterne (88.9%) and Swaythling (87.5%). The GCSE attainment (attainment 8 score) is 15% lower in Southampton than the South East regional average.	
Improved local skills and attainment	NT8	No. of staff hours spent on local school and college visits suporting pupils e.g. delivering career talks, curriculum support, literacy support, safety talks (including preparation time)	No. staff hours	£16.93		
	NT50	Innovative measures to promote local skills and employment to be delivered on the contract - there 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 £16.93 per hour, expert time valued at £101.00 per hour) and materials, equipment or other resources	£1.00		
	NT9	No. of weeks of training opportunities (BTEC, City & Guilds, NVQ, HNC - Level 2,3, or 4+) 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	No. weeks	£317.82	The percentage of Southampton residents with qualifications at level NVQ4 and above is 43.7% in Southampton which is lower than the South East regional average (45.1%).	
	NT10	No. of weeks of apprenticeships or T-Levels (Level 2,3, or 4) provided on the contract (completed or supported by the organisation)	No. weeks	£251.79		

		Growth: Support economic growth t	that contributes to	Southampton be	coming a green and environmentally sustain	nable city
Support the growth of local companies	NT14	Total amount (£) spent with VCSEs within your supply chain	£	£0.12	Southampton has a total of 8,785 enterprises, 91.6% of which are micro with 0-9 employees and 6.8% small with 10-49	
including micro and small organisations which make up much of the business base	NT15	Provision of expert business advice to VCSEs and MSMEs (e.g. financial advice / legal advice / HR advice/HSE)	No. staff expert hours	£101.00	employees. Southampton has a higher total percentage of micro and small organisations (98.4%) compared with the South East region (98.2%).	
	NT16	Equipment or resources donated to VCSEs (£ equivalent value)	£	£1.00		
	NT17	Number of voluntary hours donated to support VCSEs (excludes expert business advice)	No. staff volunteering hours	£16.93		
	NT18	Total amount (£) spent in local supply chain through the contract	£	£0.79	The largest sector in Southampton is retail with 2,130 enterprises, followed by construction with 1,145 and then professional, scientific and technical with 970.	
	NT19	Total amount (£) spent through contract with local micro, small and medium enterprises (MSMEs)	£	£0.79	Southampton has a total of 8,785 enterprises, 91.6% of which are micro with 0-9 employees and 6.8% small with 10-49 employees. Southampton has a higher total percentage of micro and small organisations (98.4%) compared with the South East region (98.2%).	
Improving staff wellbeing and mental health	NT20	No. of employees on the contract that have been provided access for at least 12 months to comprehensive and multidimensional wellbeing programmes	No. employees provided access	£130.29		Southampton City Council Health and Wellbeing Strategy 2017-2025: "People in Southampton live active, safe and independent lives and manage their own health and wellbeing"
	NT39	Mental Health campaigns for staff on the contract to create community of acceptance, remove stigma around mental health	£ invested including staff time	£1.00		

	NT21	Equality, diversity and inclusion training provided both for staff and supply chain staff	No. hrs (total session duration)*no. attendees	£101.00		Planning Southampton City Centre Action Plan 2015: "Residents will feel safe and have a sense of belonging to a place which celebrates its cultural diversity"
Support the growth of a green and responsible economy	NT15a	Provision of expert business advice to help VCSEs and MSMEs achieve net zero carbon	No. staff expert hours	£101.00		Green City Plan 2030: "It is vitally important to ensure that the city continues to support economic growth that contributes to Southampton becoming a green and environmentally sustainable city that will be resilient to the challenges of climate change."
	NT40	Number and type of initiatives to be put in place to reduce the gender pay gap for staff employed in relation to the contract (describe and document initiatives)	£ invested including staff time	£1.00	The Gender Pay Gap mean is 9% higher in Southampton than the South East regional average.	
	NT41	Percentage of staff on contract that is paid at least the relevant Real Living wage as specified by Living Wage foundation	%	Non-financial	The Hourly income in Southampton is 11% lower than the South East regional average. Southampton experiences 34.5% high to severe Income deprivation, which is 19.9% higher than the South East regional average. The wards which experience the highest levels of high to severe Income deprivation are Bitterne (77.8%),	
	NT42	Percentage of contractors in the supply chain required (or supported if they are micro or small business) to pay at least Real Living wage	%	Non-financial	Redbridge (70%) and Coxford (55.6%). The proportion of households that are fuel poor is 32% higher in Southampton than the South East regional average.	
	NT22	Percentage of your procurement contracts that include commitments to ethical employment practices in the local and global supply chain, including verification that there is zero tolerance of modern slavery,	%	Non-financial		Southampton City Council Modern Slavery Statement 2022/23: "Southampton City Council is committed to preventing slavery and human trafficking in its corporate activities and to

	child labour and other relevant requirements such as elimination of false self-employment, unfair zero hours contracts and blacklists			ensuring that the services it commissions (and where applicable, supply chains) are free from slavery and human trafficking"
NT43	Initiatives taken throughout the local and global supply chain to strengthen the identification, monitoring and reduction of risks of modern slavery and unethical work practices occurring in relation to the contract (i.e. supply chain mapping, staff training, contract management)	£ invested including staff time	£1.00	
NT49	Requirements or support (for micro or small enterprises) for suppliers to demonstrate climate change and carbon reduction training for all staff - e.g. SDGs Academy courses, Supply Chain Sustainability School bronze or higher or equivalent	No. hrs (total session duration)*no. attendees	£1.00	Southampton City Council Social Value and Green City Procurement Policy: Where appropriate to the requirement, the Council seeks goods and services that: -Minimise emissions of greenhouse gases and other pollutants
NT48	Supply Chain Carbon Certification (Carbon Trust Standard for Supply Chain or equivalent independently verified) - achieved or to achieve for current year	Y/N - Provide Certification	Non-financial	
NT23	Percentage of contracts with the supply chain on which Social Value commitments, measurement and monitoring are required	%	Non-financial	
NT35	Percentage of procurement contracts that include sustainable procurement commitments or other relevant requirements and certifications (e.g. to use local produce, reduce food waste, and keep resources in circulation longer.)			Southampton City Council Social Value and Green City Procurement Policy: Where appropriate to the requirement, the Council seeks goods and services that: -Identify and manage the wider life cycle and supply chain impacts which are designed to enable sustainable end-of-life management i.e. reused or recycled rather than disposed -Reduce and reuse resources to lower the

						consumption of virgin materials -Demonstrate responsible management of materials, evidencing recycling and recovery options for goods -Demonstrate a high standard of energy efficiency -Use renewable/cleaner energy -Minimise use of single use plastics -Minimise unnecessary water use -Reduce the number and improve the efficiency of vehicle movements to reduce congestion and emissions -Reduce emissions using technological solutions -Use environmentally and socially sustainable materials -Protect and enhance ecosystems and the natural environment -Minimise emissions of greenhouse gases and other pollutants
Improve community safety and reduce fear of crime	NT24	Initiatives aimed at reducing crime (e.g. support for local youth groups, lighting for public spaces, etc.)	£ invested including staff time	£1.00	Southampton residents Southampton experiences 79.7% high to severe Crime deprivation which is 59.3% higher than the South East regional average. Furthermore, the following wards experience 100% high to severe Crime deprivation; Harefield; Redbridge; Bevois and Bargate. Southampton sits within the police force area Hampshire. In the year ending December 2021, the highest recorded crime by offence group in Hampshire was Violence against the person at 70,045 followed by theft offences at 40,069, then Violence without injury at 27,375.	Sustainability Appraisal and Strategic Environmental Assessment for the Southampton City Vision Local Plan: Key sustainability issues identified - Population and Quality of Life - With the relatively high crime rates present within the City, perceptions of security and fear of crime are an issue for many residents and numbers of most types of crime are increasing

Reduce inequalities in health, supporting the most deprived areas (such as Redbridge, Bevois, Freemantle and Harefield)	NT26	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	£1.00	Southampton experiences 56.1% high to severe Health deprivation which is 43.5% higher than the South East regional average. The wards that experience the highest levels of high to severe Health deprivation are Redbridge (90%), Bevois (80%) and Freemantle and Harefield both with 77.8%. Life expectancy in Southampton between the years of 2018-2020 was lower for both males and females than the national average with male life expectancy at 78.3 years (1.1 years less than the England average for males) and female life expectancy at 82.5 years (0.6 years less than the England average for females). Furthermore, the healthy life expectancy* in Southampton between 2017-2019 for both males (62.6) and females (60.7) is lower than the England average (63.2 for males and 63.5 for females) (Public Health England, 2022). Southampton performs worse than the South East regional average in several indicators relating to Social: Healthier, Safer and More Resilient Communities. In relation to physical health: Deaths from alcohol related conditions is 101% higher Avoidable Mortality Rate is 31% higher Density of Fast Food Outlets is 26% higher Percentage of Adults Who Currently Smoke is 12% higher As of June 8th 2022, the vaccination update rate for all 3 doses in Southampton is lower than the regional and national average.	Southampton City Council Health and Wellbeing Strategy 2017-2025: Key Outcomes - People in Southampton live active, safe and independent lives and manage their own health and wellbeing - Inequalities in health outcomes are reduced - Southampton is a healthy place to live and work with strong, active communities - People in Southampton have improved health experiences as a result of high quality, integrated services Sustainability Appraisal and Strategic Environmental Assessment for the Southampton City Vision Local Plan: Key sustainability issues identified - Health - New health, sporting, leisure and recreational facilities should be provided and should encourage walking, cycling and more active lifestyles - Southampton has a generally poor level of health, most notable among males - Adult participation in sport has decreased in Southampton in recent years - The priorities for action identified for Southampton by Public Health England include social factors impacting health, mental health, diet, smoking, substance misuse, infections and health screening
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More working with the community	NT27	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	£1.00	The healthy life expectancy in Southampton between 2017-2019 for both males (62.6) and females (60.7) is lower than the England average (63.2 for males and 63.5 for females) (Public Health England, 2022).	
	NT28	Donations and/or in-kind contributions to specific local community projects (£ & materials)	£ value	£1.00		
	NT29	No. of hours volunteering time provided to support local community projects	No. staff volunteering hours	£16.93		
		Environme	nt: Decarbonise ar	nd improve the er	nvironment in Southampton	
Promote sustainable energy and carbon reduction	NT31	Savings in CO2e emissions on contract achieved through decarbonisation (i.e. a reduction of the carbon intensity of processes and operations, specify how these are to be achieved) against a specific benchmark.	Tonnes CO2e	£244.63	Domestic other fuels CO2 emissions (ktCO2) is 51% higher in Southampton than the South East regional average. Renewable electricity generation total (per household) is 81% lower in Southampton than the South East regional average. Renewable Energy Generation from photovoltaics (per household) is 83% lower.	Green City Plan 2030 Sustainable Energy and Carbon Reduction - We want to be Carbon Neutral by 2030 - We will make the best use of our resources and reduce our energy consumption - We will use energy that is generated from renewable sources and support the generation of sustainable energy that does not compromise local air quality
	NT83	Commitment to measure and disclose Scope 1, 2 and 3 carbon emissions	Yes, commitment to measure Scope 1, 2 and 3 emissions	Non-financial		
	NT44	Commitment to carbon emissions savings to achieve net zero carbon before 2050	Yes, Net zero before or by 2050	Non-financial		

	NT44a	Commitment to carbon emissions savings to achieve net zero carbon before 2030	Yes, Net zero before or by 2030	Non-financial		
	NT64	Contributions made to certified carbon offset funds (compliant with UKGBC guidance)	£	£1.00		
	NT45	Carbon Certification (independently verified) achieved or about to achieve	Y/N - Provide relevant documents	Non-financial		
	NT82	Carbon emissions reductions through reduced energy use and energy efficiency measures - on site	Tonnes CO2e	£244.63		
	NT44	Commitment to carbon emissions savings to achieve net zero carbon before 2050	Yes, Net zero before or by 2050	Non-financial		
	RE40	Savings in contract related embodied carbon (carbon footprint of material inputs - cradle to site) against specified baseline	Tonnes CO2e	£244.63		
	NT45	Carbon Certification (independently verified) achieved or about to achieve	Y/N - Provide relevant documents	Non-financial		
Encourage active travel	NT46	Corporate travel schemes available to employees on the contract (subsidised public transport, subsidised cycling schemes and storage, sustainable corporate transport such as electric bus from public station to corporate facilities)	Y/N - Provide description	Non-financial	The domain in which Southampton experiences the most high to severe deprivation is Outdoor Living Environment which includes road traffic accidents and pollution. Furthermore, the following wards experience 100% high to sever Outdoor Living Environment deprivation; Bargate; Bassett; Bevois; Bitterne; Bitterne Park; Coxford; Freemantle; Harefield: Millbrook:	Sustainability Appraisal and Strategic Environmental Assessment for the Southampton City Vision Local Plan: Key sustainability issues identified - Health - New health, sporting, leisure and recreational facilities should be provided and should encourage walking, cycling and more active lifestyles

	Peartree; Portswood; Redbridge; Sholing; Swaythling and Woolston.	- The development of a high quality multifunctional green infrastructure network should be promoted - The development of safe and accessible cycle networks to facilitate cyclist-friendly development, and enable intermodality with other modes of transport Green City Plan 2030 Delivering Clean Air - We will take actions that will improve the quality of life in our city. We want the Healthy Life Expectancy Indicator to be the best amongst our peers and to remove the difference cities like Southampton experience with rural areas in terms of deaths attributed to air pollution - We will reduce emissions and aspire to satisfy World Health Organisation air quality guideline values. By 2025 we want to see nitrogen dioxide levels of 25 μg/m3 as the norm Sustainability Appraisal and Strategic Environmental Assessment for the Southampton City Vision Local Plan Key sustainability issues identified: - Accessibility and Transport - Congestion is contributing to poor air quality, increased noise pollution, health issues, poor quality of the public realm and increased greenhouse gas emissions in the safe.
		Southampton City Vision Local Plan Key sustainability issues identified: - Accessibility and Transport - Congestion is contributing to poor air quality, increased noise pollution, health
		and increased greenhouse gas emissions in the city - People living in deprived areas close to the City centre or on the edge of the City can experience higher levels of pollution
		as many are close to busy roads. These people have low levels of car ownership and therefore rely on accessible and affordable public transport
		SA Objective 4: To promote accessibility and encourage travel by sustainable means

Protect and enhance the environment	NT47	Donations or investments towards expert designed sustainable reforestation or afforestation initiatives	£	£1.00	Sustainability Appraisal and Strategic Environmental Assessment for the Southampton City Vision Local Plan: Key sustainability issues identified - Population and Quality of Life - The development of a high quality and multifunctional green infrastructure network in the area will be key contributor to quality of life in the plan area Green City Plan 2030
					Our Natural Environment
					- We will protect and enhance our natural
					environment
					Sustainability Appraisal and Strategic
					Environmental Assessment for the
					Southampton City Vision Local Plan
					Key sustainability issues identified: -
					Biodiversity and Geodiversity
					- Potential impacts on priority habitats and
					species from new developments, including
					loss, damage, fragmentation and isolation - Potential effects on designated sites of
					nature conservation interest, many of
					which are in coastal location
					- Protecting and enhancing the area's
					green and blue infrastructure network will
					support local and sub-regional biodiversity
					networks by helping to improve connectivity for habitats and species, and
					provide benefits to local communities in
					terms of health and wellbeing
					- Improvements in local ecological
					networks will support biodiversity's
					adaptation to climate change
					- Access to the natural environment
					should be maintained and supported by the Southampton City Vision Local Plan.
					the Southampton City Vision Local Plan.

Promote sustainable waste	NT72	Hard to recycle waste diverted from	Tonnes	£96.70	The percentage of Municipal Waste Sent to Landfill is 121% higher in Southampton	exacerbated SA Objective 7: To conserve and enhance biodiversity Green Infrastructure and Ecosystem Services - Opportunities exist for greater tree planting along roads, where safety is not compromised, to help improve air quality and provide shading Green City Plan 2030 Resources, Waste and Water
management		landfill or incineration through specific recycling partnerships (e.g. Terracycle or equivalent)			than the South East regional average. The percentage of household waste sent for reuse, recycling or composting is 40% lower in Southampton compared to the South East regional average.	Management - We will make the best use of our resources, reduce our energy consumption, minimise waste and ensure we repair, reuse and recycle - We will use products and services that support our vision



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