

# National TOMs FM Plug-In

## The National Social Value Measurement Framework for Workplace and Facilities Management

### PART 1 - INTRODUCTION



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# Executive Summary

**Social Value is helping to articulate and highlight beyond their professional sphere the wide ranging value and impact workplace and facilities management professionals have outwith the management of the building and workspace, especially in relation to community engagement and corporate social responsibilities. For the workplace and facilities professional these shifting sands represent a massive opportunity to redefine their role, to take the image of the sector out of the plant room and establish a more value-based approach to delivering services.**

## **Key initiatives that workplace and facilities teams will need to consider in the future could include:**

- Reach out to the local authorities/councils and community to better understand and prioritise local needs
- Develop a Social Value Action Plan that identifies how they will create and maximise social value including local labour, jobs for disadvantaged people and training opportunities
- Increase the use of local supply chain contractors for cleaning, security, repairs, maintenance and landscaping
- Increase the opportunity for the local community to use the premises for community activities or meetings
- Consider how to support occupier corporate responsibility (CSR) programmes through brokering relationships with local schools and voluntary organisations and creating opportunities for volunteering in the community (e.g. Impact Days).

But this is not the only challenge facing the profession and its sector; with investors and building owners increasingly looking to understand the social impact of their assets and how their investments can contribute to community wellbeing, the workplace and facilities professional will need to learn how to navigate and deliver these emerging requirements; and finally, the particular challenge of our times – Covid-19. As we emerge from our homes and start going back to our workplaces we will discover that the local supply chain and facilities we took for granted may have been hit badly and the question will be how can the workplace and facilities team, through their buying power and influence, help communities to recover and renew.

The National TOMs FM Plug-In is part of the answer and will provide these professionals with the tools to help identify, manage and report social value.

This guidance developed jointly by IWFM and the Social Value Portal has been designed to support the workplace and facilities management profession in understanding how facilities and their service provision can add social value and its role in maximising value creation. The guidance is in 3 parts and includes the presentation of the National TOMs FM Plug-In, a national measurement framework for facilities management that has been specifically designed to help practitioners measure, maximise and report the delivery of social value along with case studies and detailed guidance of how use and apply the framework.

# Foreword



**At IWFM, we have been tracking and evaluating sustainability for over a decade. Given we are a professional body, we must make sure we do not just understand the trends and challenges our members are navigating, but also that we look for solutions that support them in delivering best practice that creates positive impacts for our members, the profession and society at large.**

Cue social value, a topic which will remain important for the foreseeable future. Social value really showed up as a recognisable trend in the 2016 Sustainability Survey and the topic has continued to develop in each survey from there. Respondents identified two key barriers to driving forward social value: a lack of a common definition and a standard set of financial and non-financial metrics that could be used as a benchmark.

Led by the results of the 2018 Survey, we set out to find an expert partner to help us in establishing a framework that would meet our members' needs. After 18 months, and with the help and support of a Steering Group and the National Social Value Taskforce, I am really excited about the publication of this framework and its supporting guidance and calculator.

This is just the beginning; we will take this forward by ensuring that: a) the framework remains relevant in the measures it details (after all, we hope that some of the measures will become redundant for the framework in the next few years as they become business as usual rather than best practice); b) wider tools become available to further support members in embedding social value throughout their organisations.

Our 2020 Survey confirmed members' commitments to social value, with an increase in those measuring social value compared to the 2018 survey. This framework will complement and innovate what is already in place or set members on their journey.

While we know for certain that 2020 will be remembered for its challenges, if we grasp this opportunity to build back better and embed strategies and practices that do good for people, communities, society and the planet, it will also assume a providential significance: the year that acted as the catalyst for meaningful, lasting positive change. Let us end this year as we mean to go on: doing better and creating a better world.

**Linda Hausmanis**

Chief Executive Officer  
Institute of Workplace and Facilities Management

# Foreword

**For so long, many facilities management professionals like myself - and the wider sector - have been keen to demonstrate the value we add through our profession.**

So often, FM-related news narrates a lowest cost approach, with its inevitable consequences. That, however, hides the story we are so proud of: the difference we can and do make to the lives of the people we work with and for, and employ. As workplace and facilities management professionals, we are in a unique position to marry the needs of the owners, occupiers and supply chain to create not just productive and happy workplaces, but great experiences, and do this in a manner which positively impacts our local communities through wider sustainability objectives.

Making a difference through my job is what I love about it, but I also must recognise that, as a profession and wider sector, we can and need to do more. This is what encouraged me to be part of the development of the FM Plug-In to the National TOMs Framework for social value measurement and management when this project was announced almost 18 months ago by IWFM.

While the Social Value Act 2012 provided a great stimulus to lock in its approach in public sector programmes and procurements, there is nothing stopping its application beyond, where its impact is felt already through supply chain commitments. I would even say that a general embedding of social value is progressing its way towards business as usual, as its positive impacts have increasingly been evidenced over the last decade. But a serious barrier to date for its implementation within the FM world is the lack of a common definition and corresponding measurement framework that provides both a transparent, robust and replicable reporting solution.

**“When you can measure what you are speaking about, and express it in numbers, you know something about it.”**

**LORD KELVIN**

After almost a decade of practising social value, the evidence shows that embedding social value into procurement unlocks additional value, does not cost more, and ultimately leads to better community outcomes. I have seen it at work, on a people, community and organisational level, and often the positive impacts affect all.

Against the backdrop of this pandemic, there has never been a better time to use the influence and power we have through our decisions to make a difference and build a better world.

Now that we have a tool that can aid this, let us shift the conversation for social value measures from best practice to business as usual. Let us show the world the difference our profession makes.

**Patrick O’Farrell,**

Head of Facilities Management  
Nationwide Building Society  
IWFM member and FM Plug-In Steering Group Member

# 1.0 Introduction

**Over the last eight years, since the publication of the Public Services (Social Value) Act 2012, the concept of Social Value has risen up the agenda informing both how the public sector buys and procures its services embedding sustainability outcomes at a local level. And while the concept was born in the public sector sphere, its use and application are accepted wide and beyond.**

This guidance has been designed to support FM professionals in understanding how facilities can add social value and their role in maximising social value creation. The guidance is presented over three sections and includes the presentation of a measurement framework, the National TOMs FM Plug-In, that has been specifically designed to help practitioners measure, maximise and report the delivery of social value. Social value in its strictest sense is defined through the Act as the economic, social and environmental wellbeing in connection with public contracts and for a business or facility it is defined as:

**“the wider social contribution that a facility creates for society through how it is managed and occupied including economic returns, the wellbeing of individuals, communities, the environment and society as a whole”**

For years now, and especially since the demise of Carillion, the wider facilities management environment has been keen to demonstrate that the buying and delivery of service provision is about more than providing a service against lowest cost. Social value provides FM stakeholders the opportunity to outline exactly where the service provision provides value, over and above the cost of the contract.

Workplace and facilities management professionals are uniquely placed to make a significant difference in this space, as they are the glue in organisations, marrying the needs of owners, occupiers and supply chain to create not just productive and happy workplaces, but also a major impact on local communities and wider sustainability objectives. Specifically for workplace and facilities professionals this could mean creating jobs for those furthest from the job market, providing apprenticeships, organising school visits, or mentoring, offering support to local communities and protecting the environment through better energy management, increased biodiversity or working to achieve net zero.

While the profession has been keen to drive social value, the lack of a widely agreed definition and especially the lack of a common measurement framework, has hindered its uptake to date according to successive IWFM Sustainability Surveys<sup>1</sup> carried out by the IWFM Sustainability Special Interest Group. The results of the 2018 survey specifically, in combination with the consequent roundtable to discuss the survey outcomes, is where the seed for collaboration between the National Social Value Taskforce, the Social Value Portal and the IWFM was planted.

The National Social Value Measurement Framework for Facilities Management, otherwise known as the National TOMs FM Plug-In has been designed to help the facilities management profession to maximise and manage the delivery of social value and is a result of 18 months of work with contributions from across the industry. The work has been led by Social Value Portal and Institute of Workplace and Facilities Management working under the auspices of the National Social Value Taskforce<sup>2</sup> which is a cross sector organisation whose mission is to promote social value across all sectors of society.

<sup>1</sup> Sustainability Survey 2017, IWFM, November 2017, 9p.

<sup>2</sup> <https://www.nationalsocialvaluetaskforce.org/>

The FM Plug-In has been designed to be used by any organisation involved in workplace and facilities management and whilst there will be slight differences across sectors (e.g. office management vs. retail) the measurement framework is broad enough to be adapted to meet most opportunities.

## About this Document

This guidance describes the philosophy behind the National TOMs Framework FM Plug-In to help organisations apply it and achieve greater reported value. It includes the overarching rationale behind each measure and proxy value as well as how each measure should be used to set targets through a Social Value Action Plan, for procurement, measurement and benefits realisation.

### The guidance is split into three parts:

**Part 1: An overview and introduction to using the National TOMs FM Plug-In including what they are intended for and how they will be kept up to date and managed over time.**

**Part 2:** A detailed description of how to use and apply the FM Plug-In for procurement or measurement, alongside guidance on collecting evidence for contract management and reporting.

**Part 3:** A full list of the National TOMs FM Plug-In including proxy values, rationales and detailed descriptions.

**“As a major asset holder with the responsibility of managing many billions of pension fund investments, we recognise that delivering more than just a good rate of return is now essential part of our real estate investment strategy. As a result, we expect our whole supply chain to engage with this agenda especially our FM providers who are on the front line of this transformation”**

Mark Tyson

Head of Occupier Engagement & Service Delivery, Legal & General

## 2.0 How can the workplace and facilities manager deliver social value?

A building or facility delivers social value across its full lifecycle including how value is created during design, construction, occupation and building management.

Project Stage	Action	Potential Outcomes
Initiation	Stakeholder consultation	Communities feel engaged via co-creation
Design	Set targets	Accessible, high quality places, and educating the community
	Community outreach	Apprenticeships created, improved skills, job creation and community projects delivered
Procurement	Local: economy, training, skills	A boost to the local economy via the use of local suppliers and increased supply chain capabilities
Construction	Delivery of Social Value Action Plan	Providing opportunities throughout the entire supply chain to work on the project
		What about benefit to local economy, we have put a lot into this aspect
Operation/in-use	Facilities management team engaged	More local employment and skills, inclusive growth, community wealth building, more resilient and healthier communities, less environmental damage
	Occupiers engaged	

Table 1 – How do facilities create social value through their lifecycle

There is an assumption that social value is predominantly delivered through the construction process. This is inaccurate and whilst the design teams and contractors can deliver much social value through community engagement, the majority of social value created is delivered through the ongoing management of a property and how the occupier engages with the local communities.



**Over 20 Years the total contribution to the community could be worth as much as +300% of the initial investment**

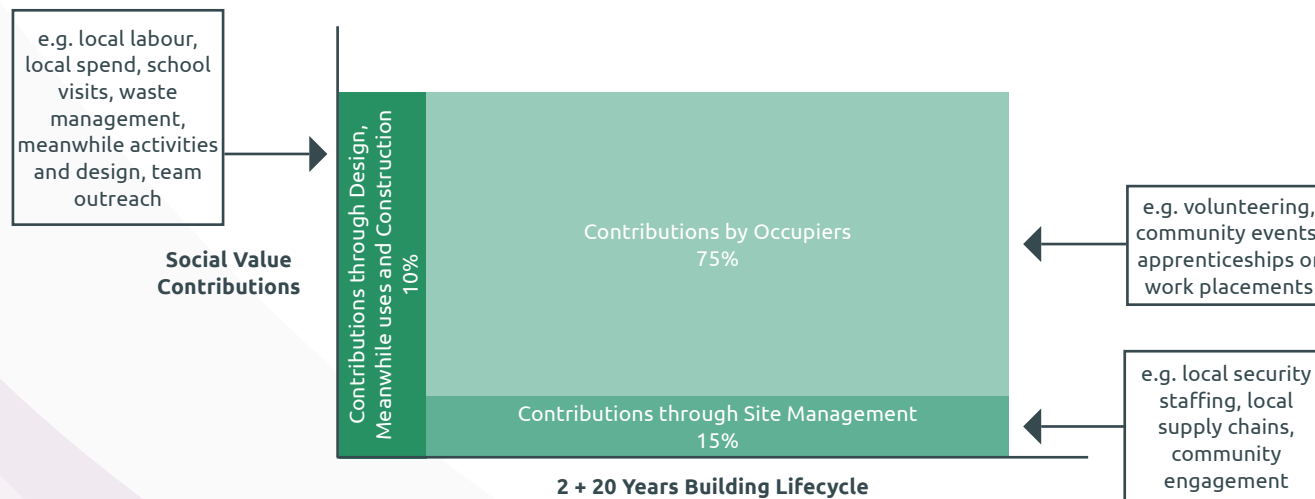


Figure 1 - Typical distribution of social value throughout the lifetime of an office building

Research by the British Council of Offices and Legal and General, in their publication 'Measuring Social Value of Offices 2016'<sup>3</sup>, indicates that the potential contribution that a facility could make through how it is managed and a locally engaged occupier could be over 80% of the total social value created over a 30 year lease period.

<sup>3</sup> [http://www.bco.org.uk/Research/Publications/Measuring\\_the\\_Social\\_Values\\_of\\_Offices.aspx](http://www.bco.org.uk/Research/Publications/Measuring_the_Social_Values_of_Offices.aspx)

At this stage it is important to note that there is a distinction between value created by the FM team and the organisation for itself and the value created for the local community and society as a whole. Both of these opportunities are important and can be facilitated by the workplace and facilities teams, although the FM Plug-In primarily focuses on the value created for communities and society rather than the wellbeing of the people employed within the business, which can be picked up using other metrics or frameworks such as Well<sup>4</sup> and Fitwel<sup>5</sup>. Table 2 outlines the activities and areas where social value has often been delivered to date as part of FM, as captured by the IWFM Sustainability Survey in 2018 and 2020.

Activity 2020	Very important	Neither	Not important	Don't know
<b>Training</b>	73%	17%	7%	2%
<b>Apprenticeships/internships</b>	56%	23%	16%	5%
<b>Charity partnerships</b>	51%	31%	16%	3%
<b>Community programme</b>	61%	22%	13%	3%
<b>Equality and diversity</b>	73%	18%	6%	3%
<b>Environmental activities</b>	75%	15%	7%	3%
<b>Other</b>	10%	17%	18%	55%

Table 2 – IWFM Survey 2020 Survey identifying importance to members of various social value initiatives comparing data from 2018 and 2020

<sup>4</sup> <https://www.wellcertified.com/>

<sup>5</sup> <https://www.fitwel.org/>

There are a number of key reasons why it makes sense for social value to be considered by the facilities manager

- **Societal value** - this allows organisations to articulate the broader contribution that they bring to society and the immediate area. It places an emphasis on delivering those activities (and measures) that help solve specific needs, making an impact that can be measured and monitored.
- **Investor Requirements** – investors are increasingly interested in understanding the wider impact on society of their investments including how assets are managed during occupation and how they contribute to the broader wellbeing of communities including how they contribute to the UN Global Goals for Sustainable Development.
- **Supply chain engagement** - there should be a focus on spending locally not only with local suppliers and SMEs, but also in building local capabilities and ensuring that the supply chain is diverse and reflects the cultural mix of the location. This will in turn help build the local economy which in turn will lead to improving local services.
- **Community engagement** - provides a vehicle for empowering communities and engaging them proactively in developing solutions and delivering better outcomes that have meaning and ‘matter’.

And finally

- **Your people** – numerous recent studies have shown that an organisations CSR strategy and Social Impact is becoming increasingly important in attracting and retaining the talent with Millennials and Generation Z continuing to be focused on larger societal issues, with the pandemic reinforcing their desire to help drive positive change in their communities and around the world (Deloitte 2020<sup>6</sup>). Key findings from the survey include
  - The pandemic has brought about an even stronger sense of individual responsibility.
  - Both generations (Millennials and Generation Z) said they’ll make a special effort to more actively patronize and support businesses—especially smaller, local sellers— after the pandemic.
  - Job loyalty rises as businesses address employee needs, from diversity and inclusion to sustainability and reskilling

**“There is a huge misunderstanding which says that somehow delivering social value involves foregoing a commercial return – that somehow being socially useful or economically useful is a zero-sum game.**

**This is complete nonsense: the two go hand-in-hand and are mutually reinforcing over any reasonable period of time.**

**The economically sustainable business is the one that has a relevant, socially useful mission or purpose”**

Nigel Wilson,  
Chief Executive of Legal & General  
Group - Speaking at the National  
Social Value Conference 2020

<sup>6</sup> <https://www2.deloitte.com/global/en/pages/about-deloitte/articles/millennialsurvey.html>

## 3.0 The role of workplace and facilities management professionals in unlocking social value

We now recognise that there is a clear link between the working environment, wellbeing and the success of an organisation and its people. Along with the emergence of the pandemic, the job of the facilities and workplace manager is becoming increasingly important and complex.

Social value adds yet another layer of complexity to this growing roster of duties that needs to be addressed and will over time transform the role of the workplace and facilities professional from someone who is solely focused on internal issues (being people, place and process) to now also look outwards to the community and more broadly to society as a whole.

On the face of it this may seem a 'duty too far' but every business should recognise the responsibility it has to support the local economy and community as it already recognises a duty to protect the environment.

However, because of the unique position workplace and facilities management professionals are holding, marrying the needs of the owners, occupiers and supply chain to create not just productive and happy workplaces but great experiences, they hold the key to delivering a potentially sizeable impact on local communities and wider sustainability objectives.

The recognition of this role plays an important part towards creating the identity of a profession that can have an enormous impact on society through the choices they make in how they are managing the facility and which don't just influence their workplaces, but which go beyond. For example- instilling people to recycle at work which is something they can take home to replicate, expanding the nutritional experience in work canteens by introducing vegan or vegetarian menus that inspires people to do this at home, helps not just in a nutritional arena, but also has an environmental impact.

But how does this translate into implementation, or put simply: how can the workplace and facilities management professional deliver against the social value agenda?

The National TOMs FM Plug-In is your starting point for the development of your social value strategy and should be viewed as a menu of opportunities and activities that could be adopted by the facilities team.

Your strategy should be supported by a Social Value Policy and the team should look to develop a Social Value Action Plan (SVAP<sup>7</sup>) that is based on a *Local Needs & Opportunities Analysis*<sup>8</sup> and updated at least every two years to reflect that changing nature of our communities. However, many suppliers will be providing services in differing areas with differing priorities so although it is possible to adopt an over-arching strategy, as the outputs are aligned to localised requirements the delivery mechanisms may vary at different sites or for different customers.

<sup>7</sup> See also Section 4.0

<sup>8</sup> A Local Needs and Opportunities Analysis will identify key local stakeholder groups, engage on their needs and identify opportunities to support. It will also identify key delivery partners which will include the local council and voluntary sector partners.

Opportunity	What could you do?
<b>In-house team</b>	
Employment & skills	In-house employment of local people
	Job opportunities for disadvantaged people such as long term unemployed
Office supplies (Food, stationery, equipment)	Prioritise the use of local businesses to deliver services and provide goods and works
Reduce Climate Change	Invest into energy efficiency to save £ and carbon
	Use a low carbon tariff and buy offsets to achieve net zero carbon
Resource management	Target 100% diversion from landfill
	Offer old equipment to local charities
Community engagement	Offer use of accessible spaces to local community
	Curate community events in outside spaces
<b>Outsourced FM team</b>	
Procurement	Embed social value into procurement processes for suppliers
Local spend	Prioritise the use of local businesses to deliver services and provide goods and works
	Use voluntary, community and social enterprises where viable
<b>Organisation</b>	
Employment & skills	Offer jobs to local people
	Engage with council to provide jobs and training to disadvantaged people including those who have lost their job due to the pandemic
Support local community	Organise school visits or on-line careers talks
	Support local community projects through volunteering
	Provide expert business advice (pro-bono) to local VCSEs and SMEs in

Table 3 – Example opportunities and activities that the workplace and FM professional could take on to maximise social Value

## 4.0 The National TOMs FM Plug-In

Social Value can be measured in a number of ways, but the most common solution is the National Social Value Measurement Framework, otherwise known as the National TOMs. This framework is endorsed by the Local Government Association and has been widely adopted across the public sector. The TOMs are also going to be usable to meet the latest central government requirements laid out in the latest guidance<sup>9</sup>.

The National TOMs were specifically designed to be sector agnostic but with the ability to adapt them to meet the specific opportunities of different sectors and the framework is being widely used within public sector procurement to build stronger and deeper relationships with suppliers to deliver more local jobs, provide new skills and training to residents, build community resilience and protect our environment, or put differently, to achieve better outcomes in economic, social and environmental areas, at local level.

The FM Plug-In is looking at the specific needs of the facilities sector because of the importance of the sector and its innate potential to have a big impact in terms of social value.

### Why a National Social Value Measurement Framework?

In the IWFM Sustainability Survey 2017, 76% of respondents called for the creation of an FM standard set of financial and non-financial metrics and the aim of the National TOMs Framework FM Plug-In is to provide a minimum reporting standard for measuring social value across the sector. For those organisations just starting out on their journey to embed social value into their procurement and management processes, it provides an easy to use solution that is immediately available and may be applied to any project. For those organisations that are already well advanced, the hope is that you will be able to integrate these standards into your measurement approach as a minimum, and add any Measures that you presently do not have into your own toolkit.

**Understanding and reporting on social value is critical in enabling us to put a value to our social, environmental and economic impacts aligned with the UN Sustainable Development Goals- from the IWFM Sustainability Survey Report 2020**

The principal benefits of a minimum and consistent reporting standard for social value are that it:

- Provides a consistent approach to measuring and reporting social value across the sector
- Allows for continuous improvement
- Provides a robust, transparent and defensible solution for assessing and awarding tenders
- Allows organisations to compare their own performance by sector and industry benchmarks and understand what 'good looks like'
- Reduces the uncertainty surrounding social value measurement for businesses, allowing them to make informed decisions based on robust quantitative assessments and hence embed social value into their corporate strategies

<sup>9</sup> Procurement Policy Note 06/20 – taking account of social value in the award of central government contracts.

## Putting a value on 'Social Value'

Part 3 of the Guidance includes a set of 'Proxy Values' that will allow users to assess the financial impact that any measure will make.

It is of course recognised that social value is not all about 'money' but nonetheless this is an important metric to help understand the scale and breadth of impact that a measure can make. Importantly, it allows procuring bodies (both public and private) to compare tenders in a way that is proportional and relevant to the bid, and to better justify a procurement decision.

Many of the Proxy Values have their roots in the Unit Cost Database (UCD) that was developed for Government and follows the principles laid out by HM Treasury for monetising the economic, environmental and social impact, with specific regard to potential savings for the public sector. Where the UCD does not provide a proxy value for a certain measure, then one has been developed following relevant governmental guidance (where it exists).

Part 2 of this Guidance provides a detailed breakdown of how the Proxy Value was arrived at, together with relevant sources and a clear rationale. The Proxy Values include deadweight where relevant, and the Calculator allows for attribution to be further taken into account during measurement. Further details about how this has been achieved can be found in Part 2 of this Guidance.

## The Power of Procurement

It is important to measure what has been delivered and to maintain a record of past performance; that is the traditional role of measurement. The National TOMs Framework, however, looks to go much further and has been designed not only to measure what has been already been done but also to deliver the change that organisations want to see. In this respect, the TOMs can be seen as an agent for change and each outcome and measure has been developed to reflect a need and to encourage businesses to become involved in supporting the fulfilment of that need.

### **“What is measured is managed and should reflect the needs of the local community”**

Specifically, the National TOMs FM Plug-In has also been designed to support procurement of the supply chain in delivering more social value and the toolkit includes a Procurement Calculator that may be used for procurement and supply chain management. This should become an essential part of the workplace and FM professionals' social value armoury and will help them maximise social value across the organisation and their supply chain.

The Procurement Calculator also includes a provision for 'prioritising' one outcome or measure against another. This allows organisations to 'signpost' to their suppliers the areas of greatest community need, or where the local authority requires the most support. The prioritisation mechanism has been designed to integrate direct stakeholder consultation (e.g. Community Social Value Charter) so that the TOMs can eventually be used to empower communities.

It is important that the resulting weightings are removed when subsequently reporting actual value after the contract has been awarded, to ensure accurate comparison. The methodology also allows for additional multipliers to be embedded within the Measurement Calculator, including LM3 and Social Return on Investment (SROI). This allows organisations that have completed this type of in-depth analysis to add more detail. Multipliers need to be verified by a 3rd party before inclusion and it is important that, if an organisation chooses to use this type of multiplier, it is declared in an open and transparent manner.

## Themes, Outcomes and Measures

The National TOMs Framework upon which the FM Plug-In is based has been designed around 5 principal **T**hemes, 20 **O**utcomes and 48 Core **M**easures (hence TOMs). The FM Plug-In builds on the National TOMs Minimum Reporting Standard and its Plug Ins, adding in another 10 Measures to reflect the specific opportunities within the sector.

- **Themes** - The overarching strategic themes that an organisation is looking to pursue
- **Outcomes** - The objectives or goals that an organisation is looking to achieve that will contribute to the Theme.
- **Measures** - The measures or activities that can be used to assess whether these Outcomes have been achieved.

### The 5 Themes are as follows:

- 1. Promoting Skills and Employment:** To promote growth and development opportunities for all within a community and ensure that they have access to opportunities to develop new skills and gain meaningful employment.
- 2. Supporting the Growth of Responsible Regional Businesses:** To provide local businesses with the skills to compete and the opportunity to work as part of public sector and big business supply chains.
- 3. Creating Healthier, Safer and More Resilient Communities:** To build stronger and deeper relationships with the voluntary and social enterprise sectors whilst continuing to engage and empower citizens.
- 4. Protecting and Improving our Environment:** To ensure the places where people live and work are cleaner and greener, to promote sustainable procurement and secure the long-term future of our planet.
- 5. Promoting Social Innovation:** To promote new ideas and find innovative solutions to old problems.

### The five Themes of the National TOMs 2020 FM Plug-In

<b>Jobs</b>	Promote Local Skills and Employment
<b>Growth</b>	Supporting Growth of Responsible Regional Business
<b>Social</b>	Healthier, Safer and more Resilient Communities
<b>Environment</b>	Decarbonising and Safeguarding our World
<b>Innovation</b>	Promoting Social Innovation



Theme	Outcomes (including COVID Plug-In)	Description
<b>Jobs</b>	Retaining jobs and skills during the COVID-19 crisis	-
	More local people in employment	Increasing employment opportunities for local people and directing resources towards the local economy.
	Fair Work	Applying fair work practices on contract and in the supply chain.
	More opportunities for disadvantaged people	Increasing employment opportunities and reducing barriers for people that face difficulties in the labour market (e.g. NEETs, under-represented gender and ethnic groups, disabled, homeless, rehabilitating young offenders, LTU).
	Improved skills	More opportunities to acquire professional skills and experience in the labour market.
	Improved skills for disadvantaged people	More opportunities to acquire professional skills and experience for people from disadvantaged backgrounds (e.g. NEETs, under-represented gender and ethnic groups, sexual minorities, disabled, homeless, rehabilitating young offenders, LTU or elderly).
	Improved skills for a low carbon transition	More opportunities to acquire professional skills and experience around a low carbon transition.
<b>Growth</b>	Improved employability of young people	Supporting young people to access and get started in the world of work.
	Supporting workers, SMEs and VCSEs to face the COVID-19 crisis	-
	More opportunities for local MSMEs and VCSEs	More growth opportunities for small local organisations and VCSE.
	Improving staff wellbeing and mental health	Ensuring staff wellbeing both at the workplace and beyond, including through an inclusive work environment.
	Reducing inequalities	Inequalities in society are engaged and reduced.
	Ethical Procurement is promoted	Ensuring that ethical business practices are rewarded in the supply chain.
<b>Social</b>	Social Value embedded in the supply chain	Increasing take up of social value delivery and measurement within the supply chain.
	Supporting communities to deal with the COVID-19 crisis	-
	Crime is reduced	Support for public safety initiatives.
	Creating a healthier community	Improved health outcome for individuals in the local area and more cohesive communities.
	Vulnerable people are helped to live independently	Social isolation is reduced and people at risk are supported.
	More working with the Community	Community organisations are supported to identify and address needs, and resources (financial and otherwise) are pledged to support them.
	Our Occupiers are more satisfied	Satisfaction of occupiers with facilities management and maintenance practices.
<b>Environment</b>	COVID-19 environmental response	-
	Carbon emissions are reduced	Reduction of CO2 emissions through contract related operations.
	Air pollution is reduced	Less air pollution from transport.
	Safeguarding the natural environment	Ensuring the natural environment is safeguarded and protected.
	Resource efficiency and circular economy solutions are promoted	Increasing resource efficiency through contract related operations.
	Sustainable Procurement is promoted	Ensuring that environmentally sustainable practices within the supply chain are rewarded.
<b>Innovation</b>	More buildings are certified	BREEAM IN-USE certification of buildings.
	Social innovation to create local skills and employment	-
	Social innovation to support responsible business	-
	Social innovation to enable healthier safer and more resilient communities	-
	Social innovation to safeguard the environment and respond to the climate emergency	-

For the National TOMs Framework, the Outcomes are linked to at least one measure each of which has a unit and value to allow the total social value to be calculated as the sum of the measures times the value. All of the measures are action-based and represent activities that a supplier could complete to support a particular desired outcome.

In constructing the National TOMs, the Taskforce has consciously kept the list as short as possible, to ensure consistency and simplicity, but long enough to cover the many facets of healthy, thriving and resilient communities.

Table 4 – Themes and Outcomes from the National TOMs FM Plug-In

## New Measures

As a part of our work, we identified a number of new opportunities and measures specific to workplace and facilities management that have been added into the National TOMs. These are as follows:

Outcomes	FM Tag	Measure
Retaining jobs and skills during the COVID-19 crisis	C19-19	No. people hired who had previously lost their job or had been unable to find work due to Covid-19
Fair Work	FM4	Union recognition agreements (or equivalent worker representation) and collective bargaining are present and encouraged in the supply chain
Improved skills	FM16	Company and supply chain policies in place that encourage and record staff engagement in Continuing Professional Development (CPD) activities based on individual interests, needs and priorities
Improved skills for disadvantaged people	FM19b	Number of hours of comprehensive training for digital skills development delivered to disadvantaged people (e.g. NEETs, under-represented gender and ethnic groups, sexual minorities, disabled, homeless, rehabilitating young offenders, LTU or elderly)
Improving staff wellbeing and mental health	FM37	Offering pro-bono responsible budgeting support to employees through a registered debt management provider (e.g. running internal programmes)
Supporting communities to deal with the COVID-19 crisis	C19-20	Initiatives to redesign spaces to address any Covid-19 related risks and impacts on staff and work
Creating a healthier community	FM53	Percent of catering contracts including requirements around nutritional content to reduce obesity and lifestyle disease and outreach campaigns to engage and inform people on the benefits of healthy food and eating
Air pollution is reduced	FM73	Internal air quality regulations and continuous monitoring policies are in place, to reduce pollution related negative health and productivity impacts
Resource efficiency and circular economy solutions are promoted	FM85	A comprehensive action plan for tracking and reducing food waste on site is in place
	FM86	Reduction of food waste through donation of leftover food to local charities
	FM87	Furniture procured on the contract which is refurbished instead of new
	FM92	Initiatives to redesign spaces to improve recycling practices (e.g. redesigning kitchens to minimise food waste)

The National TOMs FM Plug-In has been arranged into a 'Minimum Reporting' set and an 'Additional Measure' set including measures covering the pandemic, as well as a set of FM Specific measures. The framework has a modular structure, allowing for tailoring of the set of measures which are appropriate for specific projects or organisational needs and priorities. The Minimum Reporting set consists of 49 Measures that are relevant to most organisations and contexts; whilst the Additional Measures set comprises a further 64 Measures that are relevant in more specific applications such as real estate including 12 specific for facilities management. In total the FM Plug In is comprised of 113 Measures. Lastly, there are 19 additional COVID-19 measures that have been designed to specifically engage with the challenges posed by the current COVID-19 pandemic.

## How can the National TOMs be used?

The National TOMs Framework has been designed to help organisations in four principal business activities. They are not exclusive to public sector organisations and may be used by public, private or third sector providers.

- 1. Measurement and Valuation.** The National TOMs Framework will allow organisations to measure the performance of any particular project or their organisation as a whole. Analysis is delivered as both non-financial and financial outputs.
- 2. Procurement and Bid Management.** Public buying organisations (PBOs) or private sector organisations wishing to maximise the social value being delivered by their supply chain can use the National TOMs to assess and compare the benefits of multiple submissions. The National TOMs Framework provides a robust, defensible and transparent means of assessing and awarding projects based on social value.
- 3. Bid Submissions.** Suppliers can use the National TOMs Framework to calculate the benefit of their tenders and to structure their social value proposals where the purchasing organisation does not have a relevant social value Framework in place.
- 4. Contract Management & Benefits Realisation.** It is important that all claims are substantiated with relevant evidence and evidential requirements are listed within the framework. Buyers and suppliers should take note of these requirements and ensure that they do not over commit, and also that they collect the relevant data and evidence to prove delivery of any particular intervention.
- 5. Reporting.** Suppliers can use the TOMs as the basis for reporting. Reports should include both the total financial contributions as well as the non-financial achievements that sit behind the values.

Section 5.0 includes examples of how the National TOMs can be used in the context of different

activities and sectors. In support of the National Framework, the Social Value Portal has embedded the National TOMs into their online platform for measuring and managing social value.

### Keeping the National TOMs 'Live'

The National TOMs Framework is not a static tool and has been designed to evolve to reflect changing needs and pressures in society and whilst the measures represent best practice as it stands now it is clear that these will change over time as they move to business as usual allowing new measures to emerge and new aspirations to be set for levelling up and achieving other outcomes that should be attained across the wider sustainability agenda.

### What's missing?

It is inevitable that in deciding upon a 'minimum' reporting standard, the National Social Value Taskforce has had to identify only the Measures that are common to most parties and equally important across the whole of the UK. Also, the measures reflect best practice at a specific point in time. The objective of the standard is to move the conversation from best practice to business as usual. This means that when specific measures have become business as usual, they will be replaced by new aspirations for levelling up and achieving other outcomes that should be attained across the wider sustainability agenda.

As we have said, this Plug In was designed specifically for the facilities sector, as the National TOMs are designed primarily to reflect the needs of local authorities, and as such are largely sector agnostic. The National Social Value Taskforce will continue to explore sector or subject 'plug-ins' that reflect the specific needs or opportunities of individual sectors or groups. If you wish to get involved and be part of any sub-groups looking at specific plug-ins, please contact [taskforce@socialvalueportal.com](mailto:taskforce@socialvalueportal.com)

### 3.6 Feedback

The Social Value Taskforce requires as much feedback as possible so that the National TOMs FM Plug-In can be continuously improved. The Taskforce recognises that the FM Plug-In is the first publication for this sector and that it represents a starting point only. The Taskforce is committed to listening to its members and users to ensure that the National TOMs and its 'plug-ins' remain relevant and become a standard for all.

The Taskforce has established an initial programme for feedback– please get involved [here](#).

## 5.0 Case Studies

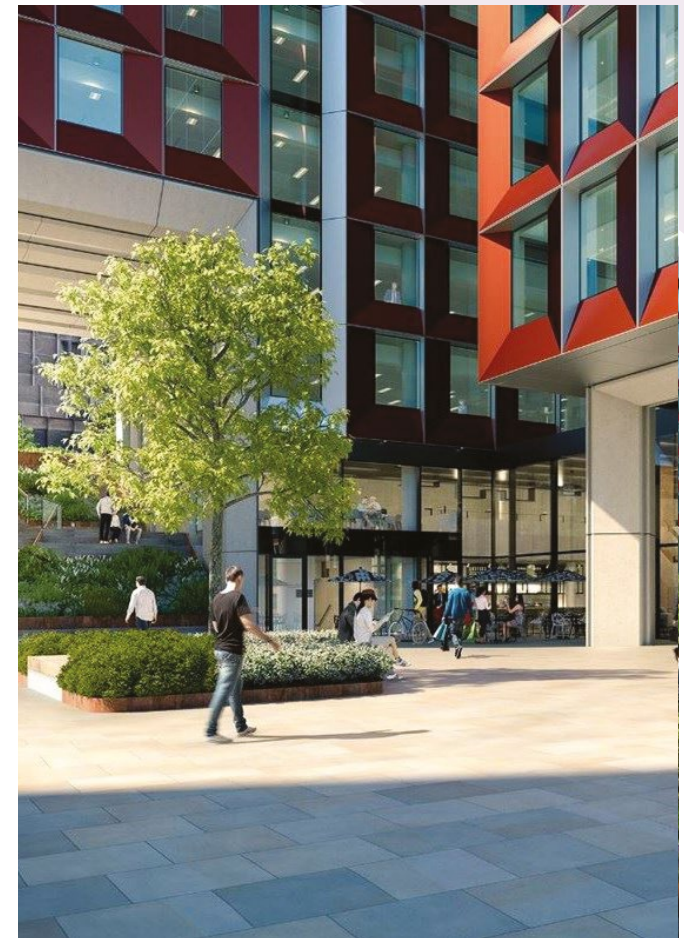
### 245 Hammersmith Road: Property Management

The managing agent for 245 HR is BNP Paribas Real Estate ('BNP'), who were appointed to the building in the first half of 2019 with a commitment to L&G to continue delivering social value at the building throughout their property management contract. Following from the construction completed by LendLease (2017-2019), BNP used the National TOMs (2019) Framework to best reflect the needs of the communities they would work with. This has helped make a difference to the economic, social and environmental wellbeing of the immediate neighbourhood and local community in Hammersmith & Fulham.

To deliver social value at 245 HR, BNP embedded a 10% social value weighting in their 4 facilities management tenders: M&E, Cleaning, Front of House and Security. Each bidder therefore had to make a quantitative and qualitative social value submission through SVP's Portal, against the National TOMs. Meetings were held individually with each bidder during the evaluation phase to help them understand, clarify and improve on their social value submission. Final social value scores were included in the overall tender scoring matrix and the contracts awarded based on each bidder's ranking.

The submission made by each winning bidder was then contractualised into targets for the first year of their contract at 245 HR. SVP's portal allowed the 4 FM suppliers to report their social value delivery, store evidence and manage progress against targets using live dashboards and displays throughout year 1.

BNP's property management team, and the building's first occupier (Hana) also reported on their social value delivery for year 1. Supported by SVP, the building as a whole achieved 119% progress against their targets and has engaged with multiple local community groups and initiatives including a strong positive COVID-19 response to support its staff and its community. The property management team, suppliers and occupiers are continuing to report, and improve on, their social value delivery for year 2. The figures overleaf show different components of the social value added through the contract.



### Project stats:

**Client:** Legal & General

**Gross Internal Area:** 330,000 sq ft

**Construction cost:** £100m

**Build duration:** 2 years

**Main contractor:** Lendlease

**Use:** Commercial office

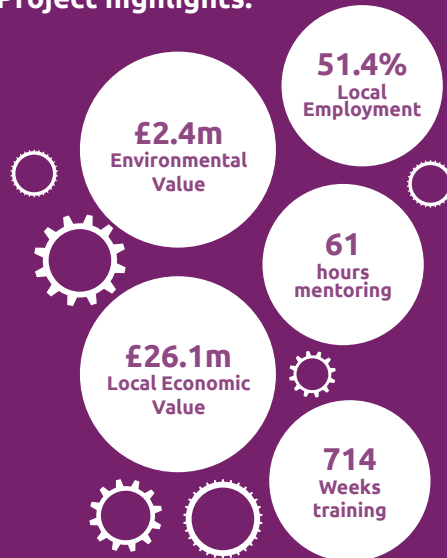
**Location:** London Borough of Hammersmith & Fulham

Total Social Value delivered: **£28.2m**

Total Social Value Add (SVA) per £ contract value: **28.2%**

Social Value delivered against target: **211%**

### Project highlights:



### Total Social Value delivered: £28.2m

Contract Value: £100m  
Social Value Add: 28%

Local supply chain spend

Local people employed

Apprenticeships and work placements



**Local skills & employment**  
153 local people employed  
2 NEETs employed  
14 weeks work placements  
708 weeks training opportunities

**Protecting & improving our environment**  
26,654t waste diverted from landfill  
148t carbon emission savings

**Local contributions**  
£1.46m S106 contributions to cycle hire, economic development and highways  
£585k CIL contributions

**Stronger, healthier communities**  
440 hours community volunteering  
£600 donations to local community projects

## The University of Greenwich, Gardiner & Theobald and Sodexo

In February 2020, the University of Greenwich (UoG) supported by consultants Gardiner & Theobald (G&T) awarded an Integrated Facilities Management (IFM) contract to Sodexo to deliver FM across the University's multi-site and historically rich estate in a fundamental departure from previous delivery models. One of the core objectives of the contract was generating social and added value, for students, faculties, employees and the local community.

From the onset of the procurement process, the UoG and G&T were clear about their objectives to leverage added value for students through an external supplier and that transformational student-based services needed to redefine business outcomes and drive cultural change.

They defined the social value priorities to be delivered through this contract as creating opportunities for students, leveraging the FM contractor's networks, student and staff wellbeing and the fair and ethical treatment of FM staff. These areas were selected as they were expected to realise the overall vision to make FM a contributor to student outcomes and to support their entry into the world of work.

A competitive dialogue process was chosen to ensure collaboration and genuine partnerships would be the outcome of the procurement process. Prior to commencing the procurement process, informal market engagement with FM suppliers took place to test the concept and looked for ideas on specific social value objectives that could end up being written into the scope of the eventual contract. During the procurement phase, the dialogue process allowed UoG as a first step to outline and discuss their vision. In a second step, bidders presented their ideas, which resulted in the refinement of the documentation reflecting the dialogue in a third step.

### Top 5 learnings from the University of Greenwich, Gardiner & Theobald and Sodexo teams

- Explore your own vision and objectives when thinking about social value – what positive social impact do you want to generate as a result of your contract? Don't try and tackle it all, but focus on those areas important to you
- Clients and procurement teams need to be proactive in championing social value
- Discuss and agree specific social value requirements at the outset of the procurement, and discuss potential for social value outcomes with bidders
- Establish a Social & Added Value Steering Group drawn from different stakeholder groups to inform the entire procurement process and its evolution afterwards
- Include your requirements for social value and metrics for its measurement in the procurement documentation

The final procurement documents saw the social value requirements being added to the final version of the service scope, which ensured that the requirements aligned to the University's values and that stakeholder approval was given. To ensure progress on social value could be demonstrated throughout the contract, the team considered how outcomes should be measured and whether to use a KPI. They also made sure to weight the tender evaluation criteria appropriately to reflect the importance of the social and added value elements and added specific questions to the tender evaluation criteria to test the remaining bidder proposals. The overall weighting was 12% to demonstrate the seriousness of the commitment.

The UoG and Sodexo are making progress towards the social value commitments and targets agreed during the procurement process. These are being reported on, measured and then audited by the Social Value Portal. The figure/table overleaf shows the progress being made and value added within the first six months of the contract.

### Project stats:

**Client:** Sodexo

**Contract Value:** average £10m/year

**Total contract duration:** 5 year

**Location:** Greenwich, London

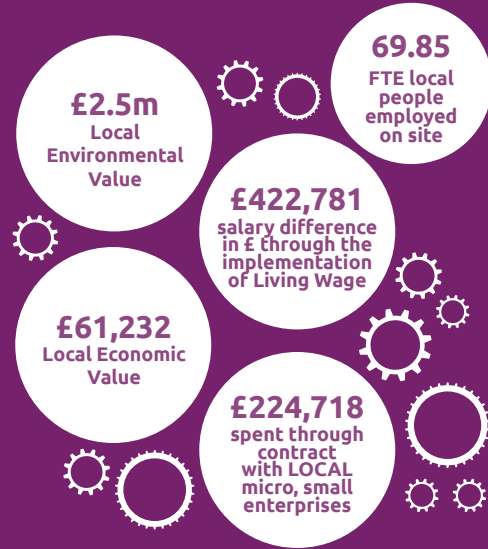
**Definition of local:** within 30 miles of the contract location

Total Social Value delivered:  
**£3,083,062.33**

Total Social and Local Economic Value Add:  
**32%**

Social and Local Economic Value delivered against target:  
**186.1%**

### Highlights – From the 1st July to 18th November 2020



## 6.0 How to take it further

### 6.1 How to embed social value more widely

Embedding social value within organisations requires its integration into organisations beyond the procurement process. Progress needs to be measured through ongoing management and auditing which means that an organisation's structures need to have been set up to allow for stakeholder engagement and buy-in throughout.

The social value outcomes an organisation will aim to achieve should be derived from the values it seeks to live and the mission and vision it holds. Organisations publicly recognised for their social responsibility, will ensure that social value sits at the core of their organisation and its structures will ensure it is delivered in its tactics from the top to the front line.

People within organisations also need to be empowered with a series of tools such as training, networks and administrative support, enabling them to capture social value and to adapt it over time according to needs. All different business functions need to participate in the delivery, including governance needs to be adjusted and communications strategies should outline and reinforce what the organisation is trying to achieve, both as an organisation and through its relationships.

Separate guidance on "Embedding social value in organisations" will be published in the first quarter of 2021.

### 6.2 Link with the UN Sustainable Development Goals

The Global Goals have been adopted by 193 world leaders at the 2015 UN's annual General Assembly. The 17 Goals identified 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. Sitting behind the 17 Goals there are 169 Targets and 232 Indicators and the Social Value Portal conducted a comprehensive mapping exercise to establish direct and indirect links between them and the Measures within the National TOMs.

There is clear alignment between the sustainability agenda promoted by the Global Goals and the social value one promoted by the National TOMs Framework. Organisations delivering social value through the National TOMs will be contributing to the Global Goals agenda.

For those organisations that are already contributing or want to start to contribute to the Global Goals agenda, the Social Value Portal have created a tool that helps leverage the National TOMs Framework's power to mobilise resources, connect organisations across sectors, and empower communities to take ownership of their needs. This tool is integrated into the Social Value Portal online solution for social value measurement and management.

The interactive tool will help organisations answer the questions: "How Can the National TOMs Contribute to the Global Goals for Sustainable Development?" – and explore how different Measures contribute to specific Goals. It has been designed as a qualitative tool that can connect the intended purpose of each measures to the Goals, and the Targets within each Goal to which it can contribute.

It also explains the different manners of measuring and reporting associated with the UN SDG as this often focuses on impact, while the TOMs also consider and value investments. Further information on the tool can be accessed on the Social Value Portal homepage (<https://socialvalueportal.com/global-goals-national-toms/>)

The IWFM Sustainability Survey 2020 evidenced how important "understanding and reporting on social value is critical in enabling us to put a value to our social, environmental and economic impacts aligned with the UN Sustainable Development Goals. The interactive tool is therefore welcomed as an initial mapping exercise to link organisations' social value work with the Global Goals.



## 7.0 Conclusion

**Social Value is becoming an increasingly important issue across both the public and private sectors. It is also clear that building owners, property investors and end-users also want to understand and maximise the social value that their properties or the buildings they occupy create.**

The FM Plug-In and Guidance provides the workplace and facilities management professional with a measurement framework that can be used to not only measure and report social value but also to manage, progress and maximise social value. It is an activity based solution that consists of a menu of measures or actions that can be taken that reflect the needs of communities and can be used to focus on activities that will make a real difference to the community where the facility is located. The FM Plug-In is designed to be flexible and may be adapted to reflect specific local needs and opportunities to help the workplace and facilities team add value where it is most needed.

Importantly, the FM Plug-In also allows users to calculate the financial value and contribution that users make to society which helps organisations understand the scale of impact which could be as high as +25% of the total annual contract value.

And finally, as we emerge from the pandemic, which brought with it a recognition of the importance of the role and impact of workplace and facilities professionals, even greater expectations are likely to be put upon these professionals to help our badly affected communities and their environments to recover and renew.

### About the National Social Value Taskforce

The National Social Value Taskforce (hereafter the NSVT) was founded in February 2016 by the National Advisory Group for local government procurement (LGA NAG) in order to establish a best-practice framework for the integration of the Public Services (Social Value Act) 2012 ('Act') into UK public-sector commissioning and procurement. Information about the work and terms of reference for the LGA NAG are available on the NSVT website

Its mission is to create healthy, thriving and resilient communities by embedding social value into all public sector activities through the services that we commission and procure and through maximising the engagement of our supply chain with communities through how they deliver these services.

The NSVT exists to oversee the following core activities:

- The ongoing development and upkeep of the National TOMs including sector plug-ins
- The development of supporting documentation and guidance to help public and private sector organisations address how they should embed social value into their business activities including procurement and planning
- Support the delivery of the National Social Value Conference and other events– where best practice may be shared
- Develop other activities and initiatives that support the development of social value good practice in support of the LGA NAG National Procurement Strategy.

The Taskforce is convened and chaired by a representative of the LGA NAG.

Information about the NSVT can be found at <https://www.nationalsocialvaluetaskforce.org/>

The LGA NAG have engaged Social Value Portal to provide secretariat services for the NSVT.

## About Social Value Portal

Social Value Portal is the leading provider social value solutions and through its innovative digital platform allows organisations to measure, procure, manage and maximise social value. SVP works across sectors and has developed deep expertise in how organisations can develop their social value strategies and maximise value creation for communities. Social Value Portal holds the IP for the TOMs and provides support for their continued development and use across the public, private and third sector. Social Value Portal provides the secretariat services to the National Social Value Taskforce.

For more information about their services contact [info@socialvalueportal.com](mailto:info@socialvalueportal.com) or visit [www.socialvalueportal.com](http://www.socialvalueportal.com).

## About IWFM

The Institute of Workplace and Facilities Management (IWFM) is the body for workplace and facilities professionals. We exist to promote excellence among a worldwide community of around 14,000 and to demonstrate the value and contribution of workplace and facilities management more widely. We empower professionals to upskill and reach their potential for a rewarding, impactful career. We do this by advancing professional standards, offering guidance and training, developing new insights and sharing best practice. As the pioneering workplace and facilities management body, our vision is to drive change for the future. To be the trusted voice of a distinct profession – recognised beyond the built environment for its ability to enable people to transform organisations and their performance.

The IWFM was established in 2018. It builds on the proud heritage of 25 years of the British Institute of Facilities Management.

To find out more, please visit [iwfm.org.uk](http://iwfm.org.uk)