

# ENGAGING WITH STAKEHOLDERS

THE NATIONAL TOMS 2019



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# PRELIMINARY DEFINITIONS

For the purposes of what follows we will refer to *stakeholders* or *reference community* to indicate the people and organisations that are affected by an activity. These include those who you are deliberately setting out to make better off, and those that might be affected beyond primary benefits or unintentionally. We will refer to *beneficiaries* to identify the people or organisations you are aiming to have an impact on.



# INTRODUCTION

The 2019 National TOMs Framework for Social Value includes some flexible tools for engaging with stakeholders and reference communities at the procurement and measurement stages.

These tools can be deployed at a basic level for organisations that are only getting started on their social value journey, or at a more sophisticated level.

The Framework not only allows for stakeholders' voices to be heard but for their needs to be incorporated at procurement stage by creating weightings for Measures that reflect their relative importance. In addition, after the Measures have been delivered, this Framework also enables beneficiaries to report what change they have experienced and identify potential additional unintentional outcomes. This information can then be included in the Measurement calculator to help inform assumptions around attribution and paint a more complete picture of the social value that has been delivered. In turn, this can lead to better strategic decision making to maximise social value through design and delivery.

The tools provided by the Framework should be applied in accordance with the Principles of Social Value articulated by Social Value UK. In particular, in the spirit of the Principle 'Involve stakeholders', they aim to help organisations make progress towards engaging with all material stakeholders throughout the design, delivery and feedback life-cycle of social value.

## Social Value Principle 1 – Involve stakeholders

**Inform what gets measured and how this is measured and valued in an account of social value by involving stakeholders.**

Stakeholders are those people or organisations that experience change as a result of the activity and they will be best placed to describe the change. This principle means that stakeholders need to be identified and then involved in consultation throughout the analysis, in order that the value and the way that it is measured, is informed by those affected by, or who affect, the activity.

We recommend users familiarise themselves with these Principles. They can be downloaded at: <http://www.socialvalueuk.org/what-is-social-value/the-principles-of-social-value/>

This document does not aim to be a comprehensive guide to identifying and engaging with different stakeholders. It aims to introduce and provide practical guidance to integrating stakeholder engagement into the National TOMs Framework. We recommend users learn more about how to overcome some of the challenges around effectively identifying and engaging with stakeholders. These challenges might be around including all material stakeholders or overcoming specific barriers to engagement for certain groups. Useful resources include Social Value UK 'Standard on Applying Principle 1: Involve Stakeholders', 2018; 'Engaging All Affected Stakeholders' published by the World Economic Forum; Guidance to the S.R.O.I. methodology; and, the AA1000 Stakeholder Engagement Standard 2015.

# ENGAGING WITH STAKEHOLDERS AT PROCUREMENT: NEEDS AND PRIORITIES

## Why consult with your stakeholders or your reference community?

Delivering social value is about meeting the needs of your stakeholders and reference communities. Involving your stakeholders and community of reference in assessing their needs makes the National TOMs more reflective of local priorities and allows the procuring organisation to include additional Outcomes and Measures that are perceived as urgent by local stakeholders.

Direct engagement with the people you are designing services for or working with also helps to build a sense of ownership and empowerment within the community. This ultimately makes the National TOMs a more powerful tool for change in the long-term.

## Who should engage with stakeholders?

Ideally all procuring organisations should be engaging with their key stakeholders, including people within the communities, before starting the procurement exercise. The actual scale of the engagement should be proportionate to the size and resources allocated to the project.

## How can you act on your findings?

The results of the consultation exercise can simply be embedded in the Procurement Calculator as a set of prioritisation weightings that guide perspective bidders towards the Measures identified as more urgent by stakeholders.

## What tools can I find in the National TOMs 2019 toolkit?

The National TOMs 2019 toolkit includes a **Needs and Priorities Survey** aimed at collecting the views of the relevant community on local priorities and additional outcomes, together with a **reporting form** that connects directly to the Procurement Calculator. Aggregate results from the survey can be collected in this form, and they will directly translate into prioritisation weightings in the Procurement Calculator.

## How should I use the Needs and Opportunities survey?

The survey should be distributed to all identified stakeholders and results should be collected before the procurement exercise starts. If some stakeholders have not been involved in the engagement this should be noted. This will ensure the engagement exercise is transparent and potential risks can be identified and minimised. Appropriate time should be allowed to ensure effective engagement with all relevant groups, according to these simple principles:

- **Be inclusive:** make sure the sample of respondents you engage with is big enough and is representative of all the relevant groups of stakeholders in your community
- **Be proportionate:** scale up or down your engagement efforts depending on the size of the reference community and the scale of the initiative
- **Be clear:** add in text as and where required to specify the relevant geographical or strategic context to the people you are engaging with.
- **Be considerate:** choose the most effective way to engage with different stakeholder groups (special consideration could be needed with some stakeholder groups if they might be facing barriers to accessing or engaging with the questions)

The survey will help identify local needs and embed them into the procurement process. Aggregate results for each question should be collected in the **reporting form** within the National TOMs 2019 Calculator spreadsheet. These will automatically generate prioritisation coefficient in the Procurement Calculator and add additional Outcomes where those have been identified.

### How should I use the Needs and Priorities Results Form?

The form will guide you to summarise a few relevant figures to describe the context of the engagement exercise: number of people engaged, number of responses, relevant stakeholder groups targeted, distribution channels, etc.

You can also identify at this stage any strengths or pitfalls in your engagement strategy. These might include adopting different distribution channels for the survey to maximise engagement or acknowledging that you might have failed to engage with a key stakeholder group and hence the results are only partially representative. This will help you be transparent about the reach and validity of your results.

For each question in the **Needs and Priorities Survey** you can add in the 'percentage of respondents that identified the Measure as a priority' in the appropriate column of the Results Form. This will generate a prioritisation coefficient for the corresponding Measure in the Procurement Calculator.

You can also list the additional Outcomes and Measures that have emerged and choose which ones you want perspective bidders to make commitments to by adding them to the National TOMs Procurement Calculator. This can be decided according to different criteria the most common being whether a significant number of respondents raised the issue as urgent.

As an advanced user you can go further and explore how prioritisation changes across different stakeholder groups.

# NATIONAL TOMs SOCIAL VALUE MEASUREMENT FRAMEWORK – NEEDS AND PRIORITIES SURVEY

This tool is aimed at procuring organisations that want to engage with their stakeholders and communities to inform the procurement exercise to reflect local needs and priorities.

The text for the survey below should be adapted to the procuring organisation to specify the geographical and project's context as indicated.

The survey is intended for use in relation to the National TOMs Framework for social value measurement, and its results can be used in the Social Value Calculator for Procurement.

The purpose of this survey is to collect stakeholders' views on which of the National TOMs' Measures are priorities for the local area in the context of the specific procurement exercise.

The survey can be distributed via a variety of channels including through face-to-face engagement when appropriate or digital platforms (as in this example: <https://socialvalueportal.typeform.com/to/bbli9>)

Results can be reported through the Report Form included in the Social Value Calculator spreadsheet. The reporting form provides a simple structure for reporting that does not aim to provide a full analysis of the results, but to establish some context for the prioritisation coefficient that are then created for the Social Value Calculator for Procurement.

The survey is designed to be used not as a one-off consultation, but increasingly as a starting point for a more comprehensive process of continuous engagement with stakeholders or the reference community. In order to facilitate this engagement, the National TOMs Framework also contains tools to engage with Stakeholders at the Measurement stage. Not sure

The Stakeholder Identification section of the survey will help you collect data about respondents' demographics and relationship to your local area, helping you identify residents, students, employees, employers, local business or VCSE managers, people that are facing additional barriers to employment or access to services, and people that participate in the community and associative life.

You might use this information to validate or test your process of stakeholder identification.

We recommend you use this information to build a more specific picture of how needs and priorities vary across different groups in your reference community.

# CUSTOMISING THE NATIONAL TOMs NEEDS AND PRIORITIES SURVEY FOR YOUR ORGANISATION

As the organisation issuing the survey, you need to define the following parameters and substitute them into the text below as indicated.

[local area]

[survey platform] – if you are distributing the survey online (e.g. Typeform, SurveyMonkey, etc.)

[Organisation issuing survey]

[Organisation issuing survey – contact email]

You are also encouraged to add text when invited to, with the objective of making the survey more specific to your local area and project.





# NEEDS AND PRIORITIES SURVEY



The purpose of this research is to understand the key challenges and needs facing [local area] as identified by the local stakeholders.

The data collected from this survey will be used to inform a targeted Social Value Action Plan for [local area]. In order to design the Social Value Action Plan effectively, we want members of the community to be part of this design process and so we are asking you to give us your views.

The purpose of this survey is to identify the key local needs, and specifically to understand your view on priorities under the following headlines;

- Promoting local skills and employment
- Supporting the growth of responsible regional business
- Healthier, safer and more resilient communities
- Protecting and improving our environment
- Promoting social innovation

Because we want the survey to be action-orientated we have developed a list of potential solutions and actions to tackle the challenges facing the local area for you to consider. However, the solutions do not need to be limited to these. **We would like to hear from you about additional measures that you think are needed to tackle local issues and create local opportunities.**

We respect your trust and protect your privacy, and therefore we take your data privacy and security seriously.

We will never share your personal data. However, the data collected from this survey may be anonymised and aggregated to be shared with third parties for reporting purposes.

The data submitted in this survey might be stored using the [survey platform] – please review the [survey platform] data policy to learn more about data storage.

By signing this form, you are confirming that you are consenting to [Organisation issuing survey] holding and processing your personal data (please tick the boxes to indicate that you have given your consent):

You can withdraw or change your consent at any time by contacting [Organisation issuing survey – contact email]

I consent to [Organisation issuing survey] processing my personal data for the aforementioned purposes. ☐



## Stakeholder Identification

### 1. What best describes your gender?

*If you prefer to self-describe, please select 'Other'.*

- a.) Male
- b.) Female
- c.) Prefer not to say
- d.) Other

### 2. What is your ethnic group?

*If you prefer to self-describe, please select 'Other'.*

- a.) White British
- b.) White Other
- c.) Asian/Asian British
- d.) Arab/Arab British
- e.) Black/African/Caribbean/Black British
- f.) Mixed/Multiple ethnic groups
- g.) Other

### 3. What is your age group?

- a.) Under 16
- b.) 16-17
- c.) 18-24
- d.) 25-49
- e.) 50-65
- f.) Over 65

### 4. What best describes your relationship to [local area]? Choose one or more:

- ii. Local resident
- iii. Local student
- iv. Local employee
- v. Local private/third sector owner or employer
- vi. Facing barriers to employment
- vii. Facing other barriers (e.g. to accessing public services such as health and care, housing, transport)
- viii. Participating in the local community and associative life (volunteering, involved in local projects, etc)



**5. If you are a Local employee, please select below what sector you are working in:**

**i. Working in Private Sector** (*choose one if relevant*)

- a.** Agriculture, forestry and fishing
- b.** Mining and quarrying
- c.** Manufacturing
- d.** Electricity, gas, steam and air conditioning supply
- e.** Water supply; sewerage, waste management and remediation activities
- f.** Construction
- g.** Wholesale and retail trade; repair of motor vehicles and motorcycles
- h.** Transportation and storage
- i.** Accommodation and food service activities
- j.** Information and communication
- k.** Financial and insurance activities
- l.** Real estate activities
- m.** Professional, scientific and technical activities
- n.** Administrative and support service activities
- o.** Education
- p.** Human health and social work activities
- q.** Arts, entertainment and recreation
- r.** Other service activities
- s.** Other

**ii) Working in Public Sector** (*choose one if relevant*)

- a.** Central Government
- b.** Local Government
- c.** NHS
- d.** Other health and social work
- e.** Education
- f.** Public administration, defence, compulsory social security
- g.** Construction
- h.** Other public sector

**6. If you are a local private/third sector owner or employer, what size is your organisation?**

- a.** Microenterprise (1 to 9 employees)
- b.** Small Enterprise (10 to 49 employees)
- c.** Medium-sized Enterprise (50-249 employees)
- d.** Large Enterprise (250 employees or more)



## 7. If you are a local private/third sector owner or employer, what sector applies to your organisation?

### a. Private sector

- i. Agriculture, forestry and fishing
- ii. Mining and quarrying
- iii. Manufacturing
- iv. Electricity, gas, steam and air conditioning supply
- v. Water supply
- vi. Construction
- vii. Wholesale and retail trade
- viii. Repair of motor vehicles and motorcycles
- ix. Transportation and storage
- x. and food service activities
- xi. Information and communication
- xii. Financial and insurance activities
- xiii. Real estate activities
- xiv. Professional, scientific and technical activities
- xv. Administrative and support service activities
- xvi. Education
- xvii. Human health and social work activities
- xviii. Arts, entertainment and recreation
- xix. Other service activities

### b. Local VCSE – Voluntary, Community and Social Enterprise

- i. Voluntary and Community sector
- ii. Social Enterprise

## 8. Please tell us the first 4-digits of your postcode **[DISCLAIMER]**:

*This applies to your household if you are a member of a local community or your workplace if you are not a resident but a local employee or employer.*



## Promoting local skills and employment

The 'Promoting local skills and employment' theme looks at promoting 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.

Within this theme there are four specific outcomes. These are the objectives or goals that will contribute to promoting local skills and employment.

- More local people in employment
- More opportunities for disadvantaged people
- Improved skills for local people
- Improved employability of young people

[Add in additional text to characterise the local approach to this specific theme]

**9. The Measures below are all important to promote local skills and employment. As a member of the community, please select which of the following are the top three priorities for [local area]. If you think you need more than three choices, you can use the next question to add those.**

- More employment opportunities for people who live in the local area (YES/NO)
- Proportion of local people employed in the local area (YES/NO)
- Employment opportunities for people who are long term unemployed (unemployed for a year or longer) (YES/NO)
- Employment opportunities for young people 18-24 who are not in employment, education, or training (NEETs) (YES/NO)
- Employment opportunities for people who are rehabilitating offenders (YES/NO)
- Employment opportunities for people with disabilities (YES/NO)
- Support into work for unemployed people over 24 through the provision of career mentoring including mock interviews, CV advice, and careers guidance (YES/NO)
- Careers talks, curriculum support, literacy support, safety talks delivered to local schools and colleges (YES/NO)
- Training opportunities leading to vocational qualifications (BTEC, City & Guilds, NVQ, HNC) to be supported by local employers (YES/NO)
- Apprenticeships opportunities to be supported by local employers (YES/NO)
- Young people supported into work (e.g. CV advice, mock interviews, careers guidance) - (under 24 y.o.) (YES/NO)
- Opportunities for meaningful work placements or pre-employment course; 1-6 weeks student placements (unpaid) (YES/NO)
- Opportunities for work placements that pay Minimum or National Living wage according to eligibility - 6 weeks or more (internships) (YES/NO)

**10. Please explain if there is any other measure/initiative relevant to 'Promoting local and skills and employment' which needs to be considered in [local area]**

**11. Please explain if there is a specific location where initiatives need to be targeted and why?**



## A healthier, safer and more resilient community

The 'Creating Healthier, Safer and More Resilient Communities' theme looks to build stronger and deeper relationships with the voluntary and social enterprise sectors whilst continuing to engage and empower citizens.

Within this theme there are four specific outcomes. These are the objectives or goals that will contribute to healthier, safer and more resilient communities.

- Crime is reduced
- Creating a healthier community
- Vulnerable people are helped to live independently
- More working with the Community

**[Add in additional text to characterise the local approach to this specific theme]**

**12. The Measures below are all important to promote a healthier, safer and more resilient community. As a member of the community, please select which of the following are the top three priorities for [local area]. If you think you need more than three choices, you can use the next question to add those.**

- Initiatives aimed at reducing crime (e.g. support for local youth groups, lighting for public spaces, private security, etc.) **(YES/NO)**
- Initiatives to be taken to tackle homelessness **(YES/NO)**
- 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. **(YES/NO)**
- Initiatives to be taken to support older, disabled and vulnerable people to build stronger community networks (e.g. befriending schemes, digital inclusion clubs) **(YES/NO)**
- Donations or in-kind contributions to local community projects (£ & materials) **(YES/NO)**
- Volunteering time dedicated to support local community projects **(YES/NO)**
- Support provided to help local community draw up their own Community Charter or Stakeholder Plan **(YES/NO)**

**13. Please explain if there is any other measure/initiative relevant to 'A healthier, safer and more resilient community' which needs to be considered in [local area]**

**14. Please explain if there is a specific location where initiatives need to be targeted and why?**



## More protection and improvement to the local environment

The 'Protecting and Improving our Environment' looks 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.

Within this theme there are four specific outcomes. These are the objectives or goals that will contribute protecting and Improving our environment.

- Climate impacts are reduced
- Air pollution is reduced
- Better places to live
- Sustainable Procurement is promoted

[Add in additional text to characterise the local approach to this specific theme]

**15. The Measures below are all important to promote the protection and improvement to the local environment. As a member of the community, please select which of the following are the top three priorities for [local area]. If you think you need more than three choices, you can use the next question to add those.**

- More use of sustainable energy sources in local industrial processes and business operations (e.g. Renewable Energy). **(YES/NO)**
- Less air pollution from transport **(YES/NO)**
- More infrastructure for low or no emission vehicles (electric cars, hybrid cars, etc.) **(YES/NO)**
- Support for the creation or management of green infrastructure, to increase biodiversity, or to keep green spaces clean **(YES/NO)**
- Public and private sector organisations buying more from businesses making measurable commitments towards sustainability, or satisfying other relevant requirements and certifications (e.g. to use local produce, reduce food waste, and keep resources in circulation longer.) **(YES/NO)**

**16. Please explain if there is any other measure/initiative relevant to 'More protection and improvement to the local environment' which needs to be considered in [local area]**

**17. Please explain if there is a specific location where initiatives need to be targeted and why?**



## Supporting Growth of Responsible Regional Business [Only showing for local public sector and local businesses]

The 'Supporting the Growth of Responsible Regional Businesses' theme looks to provide local businesses with the skills to compete and the opportunity to work as part of public sector and big business supply chains.

Within this theme there are five specific outcomes. These are the objectives or goals that will contribute to support the growth of responsible regional business.

- More opportunities for SMEs and VCSEs
- Improving staff wellbeing
- A workforce and culture that reflect the diversity of the local community
- Ethical procurement is promoted
- Social Value embedded in the supply chain

[Add in additional text to characterise the local approach to this specific theme]

**18. The Measures below are all important to promote the growth of responsible regional business. As a member of the community, please select which of the following are the top three priorities for [local area]. If you think you need more than three choices, you can use the next question to add those.**

- More business opportunities for VCSEs – Voluntary, Community and Social Enterprises (third sector) **(YES/NO)**
- Business using their expertise to support Voluntary, Community and Social Enterprises (third sector) and SMEs pro bono (e.g. financial advice / legal advice / HR advice/HSE) **(YES/NO)**
- More equipment or resources donated to VCSEs (£ equivalent value) **(YES/NO)**
- More local employees donating time to support VCSEs (beyond time spent on expert professional advice) **(YES/NO)**
- More opportunities for local business **(YES/NO)**
- More opportunities for local SMEs **(YES/NO)**
- Commitments to work practices that improve staff wellbeing, recognise mental health as an issue and reduce absenteeism due to ill health. **(YES/NO)**
- Diversity training provided for businesses **(YES/NO)**
- Commitments to ethical procurement, including to verify anti-slavery and other relevant requirements. **(YES/NO)**
- More requirements on businesses operating in the local area to create, monitor and measure social value. **(YES/NO)**

**19. Please explain if there is any other measure/initiative relevant to 'Supporting Growth of Responsible Regional Business' which needs to be considered in [local area]**

**20. Please explain if there is a specific location where initiatives need to be targeted and why?**





## Promoting social innovation

21. What other needs or opportunities should be addressed in [local area]?

# ENGAGING WITH STAKEHOLDERS AT MEASUREMENT: CLAIMING VALUE AND UNDERSTANDING WHAT REALLY CHANGED

## Why engage with stakeholders at the measurement stage?

Engaging with your stakeholders, and in particular the beneficiaries of your interventions, is a key element of creating and reporting a more complete account of social value. It can help you understand and report on the effectiveness of your interventions, pick up on unintended outcomes as well as more accurately value the change you have created. This leads to better decisions that can create more social value.

## Who should engage with stakeholders?

As for the procurement stage, ideally all organisations trying to measure social value should be engaging with their beneficiaries during and/or after the delivery of the intervention. The actual scale of the engagement should be proportionate to the size and resources allocated to the project.

## What tools can I find in the National TOMs 2019 toolkit?

The National TOMs 2019 toolkit includes the **Stakeholders and Beneficiaries Survey**. This is aimed at collecting the views of the relevant stakeholders, and especially the beneficiaries, on what changes the intervention has created for them. Where relevant, the survey will help to inform your assumptions about how much of the benefit you can claim as a direct result of your intervention or to understand how to take attribution into account. In the toolkit you will also find the Stakeholders and Beneficiaries Survey Reporting Form.

## How can you act on your findings?

The results of the consultation exercise can be summarised in the appropriate reporting form in the National TOMs Calculator spreadsheet. The reporting form allows you to automatically embed the results in the Measurement Calculator as attribution percentages, or as additional outcomes that the intervention has delivered.

## How should I use the Stakeholders and Beneficiaries Survey?

The survey should be distributed to your key stakeholders and beneficiaries so the results can be embedded in the Measurement Calculator and inform the measurement exercise.

We refer to *stakeholders* or *reference community* to indicate the people and organisations that are affected by an activity. These include those who you are deliberately setting out to make better off, and those that might be affected beyond primary benefits or unintentionally. We refer to *beneficiaries* to identify the people or organisations you are aiming to have an impact on.

The survey will be collecting quantitative and some qualitative data about the outcomes. As a more advanced practitioner, you might want to carry out some qualitative data collection before using the survey. A focus group or some interviews with open questions allow beneficiaries to reveal all of the outcomes they have experienced. This will help you manage the risk of excluding from the analysis outcomes that matter to the stakeholders and beneficiaries.

The survey should be distributed to a representative sample of all stakeholder and beneficiary groups, in line with the following principles:

- **Be inclusive:** make sure the sample of respondents you engage with is big enough and is representative of all the relevant groups of stakeholders in your community
- **Be proportionate:** scale up or down your engagement efforts depending on the size of the reference community and the scale of the initiative
- **Be clear:** add in text as and where required to specify the relevant geographical or strategic context to the people you are engaging with.
- **Be considerate:** choose the most effective way to engage with different stakeholder groups (special consideration might be needed with some stakeholder groups if they might be facing barriers to accessing or engaging with the questions)

## How should I use the Stakeholders and Beneficiaries' Survey Results Form?

Similar to the Needs and Priorities Survey Reporting form, the **Stakeholders and Beneficiaries Survey Reporting Form** in the Measurement Calculator spreadsheet is going to guide you to summarise the context and the key results from the engagement exercise.

In the Measurement Calculator you will be guided to record how many people or organisations have been affected by your National TOMs' interventions. The data you will have collected can help you better understand whether your interventions have targeted the intended beneficiaries.

The Survey will have allowed you to ask people to report the outcomes they have experienced as a result of the interventions in their own words, including unintended outcomes. These additional outcomes are an important part of the social value narrative and can eventually be valued separately.

For each measure the form will also guide you to record how much of a difference the intervention has made to the change experienced by those that have been affected by it. For each Measure, the form will automatically produce an estimate of attribution based on the data collected, which will be embedded in the Measurement Calculator. The tool will prompt you to use these attribution figures in the calculator where relevant. Notice that these should be applied once, or if, an impact multiplier has been applied to the proxy.

## National TOMs Social Value Measurement Framework – Stakeholders and Beneficiaries Survey

This tool is aimed at organisations that want to build a more complete picture of the social value delivered by their interventions by engaging with stakeholders and, in particular beneficiaries, to incorporate their views on what changes the interventions have created.

The text for the survey below is standardised and generic, and should be adapted to the organisation's project or programme to specify the context for the intervention that is being evaluated.

The survey is intended for use in relation to the National TOMs Framework for social value measurement, and its results can be used in the Social Value Calculator for Measurement.

The purpose of this survey is to collect stakeholders' views on what changes the National TOMs' Measures they have experienced have created, and how much of that change can be attributed specifically to the intervention that is being evaluated.

The survey can be distributed via a variety of channels including through face to face engagement when appropriate or digital platforms. Please notice that a stakeholder engagement strategy that takes into account the most effective way to reach different groups might be appropriate.

Results can be summarised in the related Reporting Form included in the Social Value Calculator spreadsheet. The reporting form contains a simple structure for inputting the data that does not aim to provide a full analysis of the results, but to establish some context for additional outcomes experienced by stakeholders and for the attribution coefficient that are then created for the Social Value Calculator for Measurement.

The Stakeholder Identification section of the survey will help you collect data about respondents' demographics and their relationship to your local area, helping you identify residents, students, employees, employers, local business or VCSE managers, people that are facing additional barriers to employment or access to services, and people that participate in the community and associative life. This will allow you to understand how the different beneficiaries of your National TOMs interventions are experiencing the changes these have created.

The survey also allows you to broaden the set of outcomes resulting from the National TOMs to include those that are self-reported by stakeholders.



# CUSTOMISING THE NATIONAL TOMs STAKEHOLDERS AND BENEFICIARIES SURVEY FOR YOUR ORGANISATION

As the organisation issuing the survey, you need to define the following parameters and substitute them into the text below as indicated.

[Organisation issuing survey]

[Organisation issuing survey – contact email]

[local area]

[survey platform] – if you are distributing the survey online (e.g. Typeform, SurveyMonkey, etc.)

Please note that some confusion might arise with respondents regarding interventions that they have been affected by, but that might not be the object of the analysis. For example, you might interview someone who has recently found a new job, but the job has not been provided as part of the intervention you are evaluating. To avoid this, we recommend you devise a distribution strategy for the survey that only targets beneficiaries or that, whenever some confusion might arise, clarifies the context for the survey (e.g. a specific programme or contract).

We suggest that you customise the text of the survey to add in specific references to the interventions that you are trying to measure.

# STAKEHOLDERS AND BENEFICIARIES SURVEY TEXT



The purpose of this research is to understand the change created by some of [Organisation issuing survey]'s social value interventions as experienced by its stakeholders.

The data collected from this survey will be used to inform the evaluation of these interventions. In order to understand the true value to society of these interventions, we want feedback from the members of the community that have been affected by them.

We will present you with a list of interventions, you only need to respond to the following questions based on the ones that you have been affected by.

We would also like to hear from you about additional measures that you think are needed to tackle local issues and create local opportunities, should you have any suggestions.

We respect your trust and protect your privacy, and therefore we take your data privacy and security seriously.

We will never share your personal data, however the data collected from this survey may be anonymised and aggregated to be shared with third parties for reporting purposes.

The data submitted in this survey might be stored using the [survey platform] – please review the [survey platform] data policy to learn more about data storage.

By signing this form, you are confirming that you are consenting to [Organisation issuing survey] holding and processing your personal data (please tick the boxes to indicate that you have given your consent):

I consent to [Organisation issuing survey] processing my personal data for the aforementioned purposes

You can withdraw or change your consent at any time by contacting [Organisation issuing survey – contact email] ☐



## Stakeholder Identification

### 1. What best describes your gender?

*If you prefer to self-describe, please select 'Other'.*

- a.) Male
- b.) Female
- c.) Prefer not to say
- d.) Other

### 2. What is your ethnic group?

*If you prefer to self-describe, please select 'Other'.*

- a.) White British
- b.) White Other
- c.) Asian/Asian British
- d.) Arab/Arab British
- e.) Black/African/Caribbean/Black British
- f.) Mixed/Multiple ethnic groups
- g.) Other

### 3. What is your age group?

- a.) Under 16
- b.) 16-17
- c.) 18-24
- d.) 25-49
- e.) 50-65
- f.) Over 65

### 4. What best describes your relationship to [local area]? Choose one or more:

- ii. Local resident
- iii. Local student
- iv. Local employee
- v. Local private/third sector owner or employer
- vi. Facing barriers to employment
- vii. Facing other barriers (e.g. to accessing public services such as health and care, housing, transport)
- viii. Participating in the local community and associative life (volunteering, involved in local projects, etc)



**5. If you are a Local employee, please select below what sector you are working in:**

**i. Working in Private Sector (choose one if relevant)**

- a.** Agriculture, forestry and fishing
- b.** Mining and quarrying
- c.** Manufacturing
- d.** Electricity, gas, steam and air conditioning supply
- e.** Water supply; sewerage, waste management and remediation activities
- f.** Construction
- g.** Wholesale and retail trade; repair of motor vehicles and motorcycles
- h.** Transportation and storage
- i.** Accommodation and food service activities
- j.** Information and communication
- k.** Financial and insurance activities
- l.** Real estate activities
- m.** Professional, scientific and technical activities
- n.** Administrative and support service activities
- o.** Education
- p.** Human health and social work activities
- q.** Arts, entertainment and recreation
- r.** Other service activities
- s.** Other

**ii) Working in Public Sector (choose one if relevant)**

- a.** Central Government
- b.** Local Government
- c.** NHS
- d.** Other health and social work
- e.** Education
- f.** Public administration, defence, compulsory social security
- g.** Construction
- h.** Other public sector

**6. If you are a local private/third sector owner or employer, what size is your organisation?**

- a.** Microenterprise (1 to 9 employees)
- b.** Small Enterprise (10 to 49 employees)
- c.** Medium-sized Enterprise (50-249 employees)
- d.** Large Enterprise (250 employees or more)





## 7. If you are a local private/third sector owner or employer, what sector applies to your organisation?

### a. Private sector

- i. Agriculture, forestry and fishing
- ii. Mining and quarrying
- iii. Manufacturing
- iv. Electricity, gas, steam and air conditioning supply
- v. Water supply
- vi. Construction
- vii. Wholesale and retail trade
- viii. Repair of motor vehicles and motorcycles
- ix. Transportation and storage
- x. Accommodation and food service activities
- xi. Information and communication
- xii. Financial and insurance activities
- xiii. Real estate activities
- xiv. Professional, scientific and technical activities
- xv. Administrative and support service activities
- xvi. Education
- xvii. Human health and social work activities
- xviii. Arts, entertainment and recreation
- xix. Other service activities

### b. Local VCSE – Voluntary, Community and Social Enterprise

- i. Voluntary and Community sector
- ii. Social Enterprise

## 8. Please tell us the first 4-digits of your postcode **[DISCLAIMER]**:

This applies to your household if you are a member of a local community or your workplace if you are not a resident but a local employee or employer.



## Stakeholders and beneficiaries' assessment of change

Please select the interventions you have been affected by

### 9. Have you been affected by the following Measure: 'Employment opportunities for people who live in the local area'? (Y/N)

If YES:

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

### 10. Have you been affected by the following Measure: "Employment opportunities for people who are long term unemployed (unemployed for a year or longer)"? (Y/N)

If YES:

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

### 11. Have you been affected by the following Measure: 'Employment opportunities for young people 18-24 who are not in employment, education, or training (NEETs)' (Y/N)

If YES:

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**12. Have you been affected by the following Measure: 'Employment opportunities for people who are rehabilitating offenders' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**13. Have you been affected by the following Measure: 'Employment opportunities for people with disabilities' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**14. 'Have you been affected by the following Measure: 'Support into work for unemployed people over 24 through the provision of career mentoring including mock interviews, CV advice, and careers guidance' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**15. 'Have you been affected by the following Measure: 'Careers talks, curriculum support, literacy support, safety talks delivered to local schools and colleges' (Y/N)**

**If YES:**

- 1.** What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
- 2.** How much of a difference did this intervention make to bring about these changes? (select one option)
  - a)** All the difference
  - b)** A substantial contribution
  - c)** Some difference
  - d)** A small difference
  - e)** No difference

**16. Have you been affected by the following Measure: 'Training opportunities leading to vocational qualifications (BTEC, City & Guilds, NVQ, HNC) to be supported by local employers' (Y/N)**

**If YES:**

- 1.** What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
- 2.** How much of a difference did this intervention make to bring about these changes? (select one option)
  - a)** All the difference
  - b)** A substantial contribution
  - c)** Some difference
  - d)** A small difference
  - e)** No difference

**17. Have you been affected by the following Measure: 'Apprenticeships opportunities supported by local employers' (Y/N)**

**If YES:**

- 1.** What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
- 2.** How much of a difference did this intervention make to bring about these changes? (select one option)
  - a)** All the difference
  - b)** A substantial contribution
  - c)** Some difference
  - d)** A small difference
  - e)** No difference



**18. Have you been affected by the following Measure: 'Young people supported into work (e.g. CV advice, mock interviews, careers guidance) - (under 24 y.o.)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**19. Have you been affected by the following Measure: 'Opportunities for meaningful work placements or pre-employment course; 1-6 weeks student placements (unpaid)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**20. Have you been affected by the following Measure: 'Opportunities for work placements that pay Minimum or National Living wage according to eligibility - 6 weeks or more (internships)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**21. Have you been affected by the following Measure: 'Initiatives aimed at reducing crime (e.g. support for local youth groups, lighting for public spaces, private security, etc.) [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**22. Have you been affected by the following Measure: 'Initiatives to be taken to tackle homelessness [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**23. Have you been affected by the following Measure: '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. [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**24. Have you been affected by the following Measure: 'Initiatives to be taken to support older, disabled and vulnerable people to build stronger community networks (e.g. befriending schemes, digital inclusion clubs) [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**25. Have you been affected by the following Measure: 'Donations or in-kind contributions to local community projects (£ & materials) [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**26. Have you been affected by the following Measure: 'Volunteering time dedicated to support local community projects [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**27. Have you been affected by the following Measure: 'Support provided to help local community draw up their own Community Charter or Stakeholder Plan [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**28. Have you been affected by the following Measure: 'More use of sustainable energy sources in local industrial processes and business operations (e.g. Renewable Energy)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**29. Have you been affected by the following Measure: 'Less air pollution from transport' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference





**30. Have you been affected by the following Measure: 'More infrastructure for low or no emission vehicles (electric cars, hybrid cars, etc.)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**31. Have you been affected by the following Measure: 'Support for the creation or management of green infrastructure, to increase biodiversity, or to keep green spaces clean' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**32. Have you been affected by the following Measure: 'Public and private sector organisations buying more from businesses making measurable commitments towards sustainability, or satisfying other relevant requirements and certifications (e.g. to use local produce, reduce food waste, and keep resources in circulation longer.)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**33. Have you been affected by the following Measure: 'More business opportunities for VCSEs - Voluntary, Community and Social Enterprises (third sector)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**34. Have you been affected by the following Measure: 'Business using their expertise to support Voluntary, Community and Social Enterprises (third sector) and SMEs pro bono (e.g. financial advice / legal advice / HR advice/HSE)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**35. Have you been affected by the following Measure: 'More equipment or resources donated to VCSEs (£ equivalent value)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**36. Have you been affected by the following Measure: 'More local employees donating time to support VCSEs (beyond time spent on expert professional advice)' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**37. Have you been affected by the following Measure: 'More opportunities for local business' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference

**38. Have you been affected by the following Measure: 'More opportunities for local SMEs' (Y/N)**

**If YES:**

1. What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
2. How much of a difference did this intervention make to bring about these changes? (select one option)
  - a) All the difference
  - b) A substantial contribution
  - c) Some difference
  - d) A small difference
  - e) No difference



**39. Have you been affected by the following Measure: 'Commitments to work practices that improve staff wellbeing, recognise mental health as an issue and reduce absenteeism due to ill health. [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

- 1.** What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
- 2.** How much of a difference did this intervention make to bring about these changes? (select one option)
  - a)** All the difference
  - b)** A substantial contribution
  - c)** Some difference
  - d)** A small difference
  - e)** No difference

**40. Have you been affected by the following Measure: 'Diversity training provided for businesses [insert references to specific intervention(s)]' (Y/N)**

**If YES:**

- 1.** What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
- 2.** How much of a difference did this intervention make to bring about these changes? (select one option)
  - a)** All the difference
  - b)** A substantial contribution
  - c)** Some difference
  - d)** A small difference
  - e)** No difference

**41. Have you been affected by the following Measure: 'Commitments to ethical procurement, including to verify anti-slavery and other relevant requirements.' (Y/N)**

**If YES:**

- 1.** What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
- 2.** How much of a difference did this intervention make to bring about these changes? (select one option)
  - a)** All the difference
  - b)** A substantial contribution
  - c)** Some difference
  - d)** A small difference
  - e)** No difference



**42. Have you been affected by the following Measure: 'More requirements on businesses operating in the local area to create, monitor and measure social value' (Y/N)**

**If YES:**

- 1.** What changed as a result of this intervention? Please tell us in your own words what are the intended or unintended changes that you have experienced (open answer)
- 2.** How much of a difference did this intervention make to bring about these changes? (select one option)
  - a)** All the difference
  - b)** A substantial contribution
  - c)** Some difference
  - d)** A small difference
  - e)** No difference

Thank you for taking part in this consultation and telling us more about the change you have experienced. Your contribution will inform the evaluation of [Organisation issuing survey]'s social value interventions.

If you have any queries regarding this survey or the storage of your data you can contact us at: [Organisation issuing survey – contact email]