

Appendix 2: Example Social Value Metrics and Indicators

N.B. It is extremely unlikely that any client would expect its supply chain to collect all of this material. Some clients might require different metrics and indicators to be reported

Key to types of metric / indicator listed in table			
Management / process indicator or metric	“Input” indicator or metric	“Output” indicator or metric	“Outcome” indicator or metric

School issue	Business activity	Indicator	Metrics	Possible supporting evidence	
	Job creation	Impact on [local] employment and unemployment rates	Number of new jobs created Number of jobs saved	HR records Case study / context	
	Employment for ex-offenders, veterans, long-term unemployed & people with specific 'protected characteristics'	% hours worked by ex-offenders / veterans / previously unemployed / people of specific protected characteristics (women, disabled people, BAME people, LGB & T people, people of different ages and religions)	Hours worked by total workforce (1)	Timesheets / site access records	
			Hours worked by individuals who have previously identified themselves as being from specific 'target groups' and/or of particular protected characteristics	Diversity monitoring forms / HR records Case study / context	
			Total number of FTE workers (1)	Timesheets / site access records	
			% of FTE workers (by number) who are ex-offenders / veterans / previously unemployed / people of specific protected characteristics	Diversity monitoring forms / HR records Case study / context	
	“Local employment”	Number of job vacancies publicly advertised (e.g. via Job Centre Plus) to local communities		Job adverts / HR records, case study / context	
			% hours worked by local workforce	Hours worked by people who live permanently within the are identified as “local” Time sheets / site access records / Postcodes of places of permanent residency (e.g. from site inductions or HR records), case study / context	
	Fairness, inclusion & respect; equality & diversity	[Trends in] % participation of people of different protected characteristics (women, BAME, disabled, LGB & T, different ages, different religions etc.) at each different phase of the HR cycle (interview, recruitment, training promotion, redundancy, retirement etc.)		Number of people of different protected characteristics (women, BAME, disabled, LGB & T, different ages, different religions etc.) at each different phase of the HR cycle (interview, recruitment, training promotion, redundancy, retirement etc.)	Diversity monitoring forms Analysis of aggregated HR data Case study / context
			% of requests for flexible working accepted	Number of requests made for flexible working	Articulation and communication of process
				Number of requests made for flexible working accepted	Aggregated HR data, case study / context
			% gender pay gap		HR records , case study / context
			% race pay gap		HR records, case study / context
			% of requests for shared maternity / paternity leave accepted	Number of requests made for shared maternity / paternity leave	Articulation and communication of process
				Number of requests for shared maternity / paternity leave accepted	Aggregated HR data, case study / context
			% of new mothers who have returned to and stayed in workplace	Number of women taking maternity leave	HR records
Number of women who are still in the workplace 12 months after returning from maternity leave				HR records, case study / context	
% of complaints, grievances, calls to whistleblowing line or equivalent that are equality or FIR related			Number of equality/ FIR related complaints, grievances, calls to whistleblowing line or equivalent	Articulation and communication of whistleblowing process, Aggregated data from whistleblowing line or equivalent, case study / context	
	Number of complaints, grievances, calls to whistleblowing line or equivalent				

Employment		% workers that have received equality and diversity/Fairness Inclusion and Respect training (e.g. a half hour Toolbox Talk)	Number of workers that have received equality and diversity/Fairness Inclusion and Respect training (e.g. a half hour Toolbox Talk)	Training records, case study / context
		Number of equality/ FIR related cases taken to and/or settled before Industrial Tribunal		HR records, case study / context
		Trends in turnover of staff, including those in relation to people of different protected characteristics		HR records, case study / context
	Employee engagement	% of workers participating in employee engagement surveys and activity	Number of workers participating in employee engagement surveys and activity	Employer engagement survey / analysis of aggregated responses to survey
		[Trends in] % of responses to specific employee engagement questions	Worker responses to specific employee engagement questions	Employer engagement surveys from more than one year / analysis of aggregated responses to surveys, case study / context
	Health & well-being	Number of activities undertaken to promote health and well-being of workers (over and above statutory health surveillance checks)		Health centre records, case study / context
		% of workers having health surveillance checks over and above statutory minimums	Number of workers offered health surveillance checks over and above statutory minimums	Communications, case study / context
			Number of workers accepting offer of health surveillance checks over and above statutory minimums	Health centre records, case study / context
		Number of drop-ins to on site medical service		Health centre records, case study / context
		Demonstrable benefits to individuals of occupational health care (e.g. types of health issues identified and addressed early, so pre-empting sick leave for a self-employed individual)		HR records, case study / context
	Fair pay & labour conditions	% working to zero hours contracts	Number of workers working to contracts / agreements that do not guarantee any minimum number of working hours	HR records, procurement system records, case study / context]
		% employed through umbrella companies	Number of workers employed through "umbrella companies"	HR records, procurement records, terms and conditions of contract, communication with providers of labour, case study / context
		% of workers employed through PAYE	Number of workers employed through contracts with a minimum guaranteed number of hours of paid work per week and taxed PAYE	HR records, procurement records, terms and conditions of contract, communication with providers of labour, case study / context
% workforce paid Living Wage or more		Number of workers receiving from their employer (before deduction of tax and NI only) an hourly rate that is at least the equivalent of the relevant Living Wage, as defined by the Living Wage Foundation	HR data on number / roles of people being paid less than £10 per hour (2015 figures) in last payroll period and the hourly rate paid to each Case study / context	
Demonstrable benefits to individuals of reducing use of controversial labour practices			HR records, case study / context	
	% hours worked by apprentices	Number of hours worked by workers inducted on site who are employed within an accredited apprenticeship programme, involving an employer and a third-party training provider	Timesheets / site access records Training records Induction forms Apprenticeship Completion Certificates Case study / context	

Skills	Apprenticeships	Number of new apprenticeship starts		HR records, training records, induction forms, case study / context
		Number of apprenticeship completed		HR records, training records, induction forms, Apprenticeship Completion Certificates, case study / context
		% hours worked by trainees	Hours worked by workers inducted on site who are participating in vocational or academic training and/or skills development opportunities provided to them by their employer	Timesheets / site access records Training records Case study / context
	Work experience	Number of a people undertaking a placement who are ex-offenders / veterans / long term unemployed / NEET / people of specific protected characteristics (women, disabled people, BAME people, LGB & T people, people of different ages and religions)		HR records Diversity monitoring forms Case study / context
		Number of a people undertaking a placement as part of the national curriculum or as a specific qualification such as Diploma programmes or Young Apprenticeship, Programme led Apprenticeships		HR records Training records Case study / context
		Number of days of work experience provided to NEET people or people undertaking a placement as part of the national curriculum or as a specific qualification such as Diploma programmes or Young Apprenticeship, Programme led Apprenticeships		Timesheets / site access records Training records Case study / context
		Work experience placements resulting in a NEET person / ex-offender / veteran/ long term unemployed / person of specific protected characteristics [re]gaining paid work		HR records Diversity monitoring forms Case study / context
	Graduate development	% hours worked by graduates (those on an official company graduate programme)	Hours worked by graduates (those on an official company graduate programme)	Timesheets / site access records Training records Case study / context
	Employee development	Average number of hours of training/ development provided to all workers (e.g. per annum)	Hours of training delivered to the workforce where those workforce members are NOT trainees, apprentices or on traineeships	Training records Training plans Copies of Completion Certificates for NVQs Case study / context
			Number of workers provided with training, where those people are NOT trainees, apprentices or on traineeships	Training records Training plans Copies of Completion Certificates for NVQs Case study / context
Employee(s) meeting and/or exceeding their potential			HR records, case study / context	
Ethical business	% suppliers with ethical code of conduct meeting or exceeding minimum requirements	Number of supply chain partners (1)	Procurement system records, accounting system records	
		Number of supply chain partners who are determined to have an ethical Code of Conduct in place that applies to delivery of this project	Supplier surveys/ questionnaires Suppliers' ethical codes of conduct Case study / context	
	Number of prosecutions or investigations of companies within the supply chain of this project, or prosecution of individuals in relation to their activities		Procurement system records, supplier surveys / questionnaires, case study / context	

Ethics

	% of contracts let including ethical requirements	Number of contracts let (1) Number of contracts awarded to any supply chain partners which include ethical requirements and clauses in alignment with client objectives, including the requirement to push these further through supply chains	Procurement system records Contract terms and conditions Case study / context
	% of workers that have received anti-bribery and corruption training	Number of workers that have received anti-bribery and corruption training	Training records
Responsible design	Number of Diversity and Inclusion Impact Assessments undertaken and results fed into design(s)		D&I Impact Assessments, notes of design meetings, designs
	Number of [external] stakeholder engagement exercises undertaken and results fed into design(s)		Engagement event agendas, notes, sign-in sheets and photographs. Notes of design meetings, designs, case study / context
	Benefits to community (e.g. disabled and elderly people) delivered through consciously responsible design		Third party evaluation, case study / context
	Increase in community access to open space	m2 of green space	Plans, third party evaluation, case study / context
	Increase in wellbeing resulting from community access to open space		Third party evaluation, case study / context
	Increase in availability of community space	m2 of space available for community use	Plans, third party evaluation, case study / context
		£ investment in conserving heritage assets	Budgets, third party evaluation, case study / context
	% of affordable or 'lower cost' housing units in our portfolios	Number of affordable or 'lower cost' housing units in our portfolios	Plans, third party evaluation, case study / context
Responsible sourcing / material selection	% materials purchased that were responsibly sourced (by value) using UKCG's definition	Total spend on materials Spend on materials that are "responsibly sourced" according to the UKCG's definition	Procurement records Procurement records, contract terms and conditions, orders, delivery notes, case study / context
	% materials purchased that were responsibly sourced (by volume)	Volumes of different materials purchased that are "responsibly sourced" according to the UKCG's definition	
		Number of invoices paid	Accounting system records
Prompt & fair payment to supply chain	% payments in period in accordance with agreed terms	Number of invoices paid in accordance with agreed terms	Accounting system records, contract terms and conditions, case study / context
	Average number of days for invoice payment (between receipt and payment)		Accounting system records
	% of supply chain partners who are signatories to Prompt Payment Code	Number of supply chain partners who are signatories to Prompt Payment Code	Company name appears within list of "signatories" at www.promptpaymentcode.org.uk
	% spend with small and medium enterprises (SMEs)	Total spend with supply chain partners (1)	Accounting system records, supplier survey / questionnaires, confirmation from credit rating agency that a supplier is an SME
	% spend with women owned enterprises (WBEs)	Spend with all suppliers, sub-contractors, consultants and/or	Accounting system records, supplier survey / questionnaires. Certification from WECconnect or equivalent. Case study / context

["Local"] Business

"Inclusive procurement" (SMEs, social enterprises, voluntary & community organisations in supply chains)	% spend with Black, Asian and Minority Ethnic (BAME) enterprises	Spend with all suppliers, sub-contractors, consultants and/or designers, who have been identified (or identified themselves) as being an SME, WBE, BAME, social enterprise, voluntary/community group	Accounting system records, supplier survey / questionnaires. Certification from MSD(UK) or equivalent. Case study / context
	% spend with social enterprise, voluntary and community (SE & VC) supply chain		Accounting system records, supplier survey / questionnaires. Case study / context
	% SMEs / WBEs / BAME / SE&VC in supply chain	Total Number of supply chain partners to whom contracts have been awarded or with whom orders have been placed (1)	Procurement system records
		Number of supply chain partners to whom contracts have been awarded or with whom orders have been placed, who have been identified (or identified themselves) as being an SME, WBE, BAME, social enterprise, voluntary/community group	Supplier survey / questionnaires. Certification from WEConnect or MSD(UK) or equivalent. Confirmation from credit rating agency that a supplier is an SME
	% SMEs invited to quote or tender	Total number of potential supply chain partners who are invited to quote or tender for contracts	Procurement system records
		Number of potential supply chain partners who are invited to quote or tender for contracts and who are SME	Procurement system records, supplier survey / questionnaires, confirmation from credit rating agency that a supplier is an SME. Case study / context
	Number of SE & VC / SME / WBE / BAME organisations supported through capacity building		Sign in sheets, communication from beneficiaries, case study / context
	Benefits to SE & VC / SME / WBE / BAMEs of capacity building		Communication from beneficiaries, case study / context
% of supply chain partners who are implementing a documented "inclusive procurement plan"	Number of supply chain partners who are implementing a documented "inclusive procurement plan"	Procurement system records. Supplier survey / questionnaires. Inclusive procurement plans. Case study / context	
"Local" procurement	% local spend	Spend with supply chain partners who are "local"	Accounting system records. Written evidence of postcodes of 'local' supplier(s). Case study / context
	% local SME spend	Spend with supply chain partners who are SME and have employees working at a "local" address	Accounting system records. Supplier survey / questionnaire. Credit rating agency confirmation that company is SME. Written evidence of postcodes of 'local' supplier(s). Case study / context
	% local companies in supply chain	Total Number of supply chain partners to whom contracts have been awarded or with whom orders have been placed who are "local"	Procurement system records. Written evidence of postcodes of 'local' supplier(s). Case study / context
	% local SMEs in supply chain	Total Number of supply chain partners to whom contracts have been awarded or with whom orders have been placed who are "local" and SME	Procurement system records. Supplier survey / questionnaire. Credit rating agency confirmation that company is SME. Written evidence of postcodes of 'local' supplier(s). Case study / context
	% local SMEs invited to quote or tender	Number of potential supply chain partners who are invited to quote or tender for contracts and who are SME and "local"	Procurement system records. Supplier survey / questionnaire. Credit rating agency confirmation that company is SME. Written evidence of postcodes of 'local' supplier(s). Case study / context

		% of supply chain partners who are implementing a documented "local procurement plan"	Number of supply chain partners who are implementing a documented "local procurement plan"	Procurement system records. Supplier survey / questionnaires. Local procurement plans. Case study / context
Community	Community relations	Number of community engagement activities undertaken		Engagement activity communications and briefings, photographs, stakeholder communications. Case study / context
		Trends in complaints and compliments	Number of complaints, by type	Analysis of complaints logs. Case study / context
			Number of compliments, by type	Analysis of compliments logs. Case study / context
		Average number of days taken to close out complaints		Analysis of complaints logs. Case study / context
		Days lost due to complaints		Site records. Case study / context
		Considerate Contractors Scheme (CCS) score		Communication from CCS
		% confidence in achieving target CCS score		CCS self-score. Case study / context
	Educational engagement (e.g. STEM activity, careers guidance)	Number of educational engagement activities undertaken		Engagement activity communications and briefings, photographs, stakeholder communications. Case study / context
		Number of client educational engagement activities supported		Engagement activity communications and briefings, photographs, client communications. Case study / context
		Number of people supported by educational engagement activity (e.g. according to their protected characteristics, numbers eligible for free school meals etc.)		Sign in sheets. Diversity monitoring forms. Stakeholder communications. Case study / context
		Improvements to student attainment as a result of educational engagement (e.g. increased number of people winning and taking up courses at Russell Group Universities)		Stakeholder communications. Case study / context
	Volunteering	£ value of volunteer days	Total number of volunteer days during paid working hours	HR records. Case study / context
		Average number of volunteer days per employee		HR records. Case study / context
		Number of projects delivered through volunteering		Activity communications and briefings, photographs, stakeholder communications.
		Number of projects supported through volunteering		Activity communications and briefings, photographs, stakeholder communications. Case study / context
		Actual improvements to communities resulting from volunteering		Third party evaluation, stakeholder communications, case study / context
		Number of people seconded to work within social enterprises		HR records. Case study / context
	% of workforce taking part in workforce (payroll) giving	Number of workers participating in a workforce (payroll) giving scheme	HR records	
		£ donations through workplace (payroll) giving	HR records	
		£ corporate citizenship / philanthropic contributions through matched giving	Charity panel (or equivalent) meeting notes. Payment records. Case study / context	
		£ donations through workplace fundraising	Stakeholder feed-in. Case study / context	

Charitable giving	Total £ contributed through charitable / community giving	£ corporate citizenship / philanthropic contributions through commercial initiatives	Charity panel (or equivalent) meeting notes. Payment records. Case study / context
		£ corporate citizenship / philanthropic contributions through community investment	Charity panel (or equivalent) meeting notes. Payment records. Case study / context
		£ value of in-kind donations (materials etc.)	Communications. Briefings. Photographs. Case study / context
	% of corporate citizenship / philanthropic contributions that are through charitable donations / commercial initiatives / community investment		Charity panel (or equivalent) meeting notes. Payment records. Case study / context
	Improvements to communities resulting from charitable giving Benefits to business delivered through corporate citizenship / philanthropic contribution / charitable and community giving	£ management overhead to organise charitable giving	Third party evaluation, stakeholder communications, case study / context stakeholder communications, case study / context
Air quality	% clean vehicles (by number)	Total number of vehicles working on, delivering to or visiting	Site access records
		Total number of vehicles working on, delivering to or visiting that have a Reduced Pollution Certificate (RPC) and/or whose engine quality exceeds the current requirements of the London LEZ	Site access records. Contract terms and conditions. Orders. Stakeholder communications. Case study / context
	% clean plant (by number)	Number of different machine engines used	Orders. Delivery notes. Site records
		Number of different machine engines used that are fitted with particulate filters / filtration systems and/or operate off mains or battery power	Contract terms and conditions. Orders. Delivery notes. Site records. Case study / context
	% of air samples meeting "acceptable standard" criteria for project	Number of air samples, analysed and recorded, to monitor for particulates, dust, fumes and/or other emissions to air Results of air samples that meet "acceptable standard" criteria for project	Air sampling records Analysis of air sampling records. Case study / context
Noise & disruption	% of complaints related to noise and disruption	Number of complaints related to noise and disruption	Analysis of complaints logs. Case study / context
	% of noise readings meeting acceptable levels	Number of noise readings taken	Noise reading records
		Number of noise readings taken that exceed acceptable levels	Analysis of noise reading records. Case study / context

(1) This input-based metric is required in order to calculate more than one output or outcome - based indicator