



Summary report

Review period February – March 2020

Social Value

Welcome to our review on Social Value. Our role is to explore, examine and test Phoenix services on behalf of residents. We make recommendations to improve services and satisfaction. We chose to investigate this topic because we wanted to find out more about social value and the types of activities that Phoenix provide.

How we carried out the review

We examined the service through a document review.

We interviewed the Service Improvement & Scrutiny Manager, Community Links Project Manager, Procurement & Contracts Manager and Head of Community Engagement.

Meet the panel

The panel is made up of five members. We welcomed Anne and Geraldina who observed our meetings. We say goodbye to long-standing panel member, Deirdre Kennedy who left the Scrutiny Panel after completing this review to join the Resident Communications Group.

Join us!

If you'd like to help put Phoenix under the microscope, improve services and satisfaction, please get in touch.

The scope for the review was:

To review how Phoenix assesses its activities for social value.

To measure the success of the review we set out to:

- Understand the definition of social value.
- Identify the types of activities Phoenix assesses for social value and understand the additional opportunities that are available.
- Understand how Phoenix measures and monitors social value and identify other options.
- Assess whether Phoenix provides social value and evidence the types of return.
- Evidence how Phoenix publicises its social value.
- Demonstrate the difference Phoenix makes to the local community through social value.

Definition of social value

Social value can be described as the wider non-financial impacts of programmes, organisations and projects, especially on the wellbeing of individuals and communities and of the environment.



Eileen Davies



Karen Stokes



Gwen Smith



Deirdre Kennedy



Frank Osborn

Our key findings



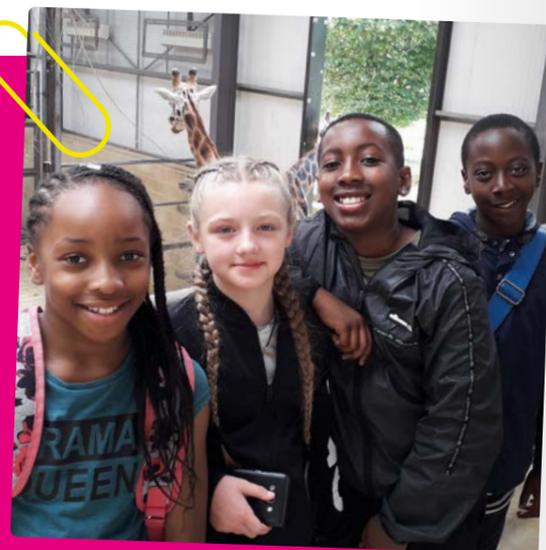
Since 2012, there has been a requirement on public bodies, including housing associations, to provide social value. The non-cash impact of these benefits look to improve the wellbeing of Phoenix residents, the local community and environment. Phoenix expects its contractors to deliver social value as part of their contract and provides contractors with a social value 'menu of options'. The options include ideas and examples of how they can provide social value.

Phoenix receives social value as part of its procurement processes and contract management.

Conclusion

We have found that Phoenix already shows and demonstrates their commitment to social value on every project that is worked on whether it be in-kind or as a financial benefit. The way that social value is calculated can sometimes be hard to understand but when applying the methods consistently, it seems to work. Phoenix should continue to use the methodologies that are currently in place.

Phoenix should provide more information and transparency about its social value to residents so that they fully understand that when Phoenix spends money, they try to make sure that they're getting something back that will improve the lives and local area for all Phoenix residents.



£100k

The Phoenix Community Chest is a £100K annual fund available to community projects that will make a difference to the Phoenix Community.

Each Community Chest project must complete an end of project report. The information and data in the report supports Phoenix to assess and calculate the social value for the activities and events provided by each project.



Since 2017-18, **£3,868.34** has been raised by staff for charities such as St Christopher's Hospice, local food banks and more, through donations, cake sales, Christmas jumper day, jeans day, coffee mornings and auctions.



There are lots of variables that can influence the social return on investment during calculations from the number of participants, the type of activity, the type of outcome and the evidence that the outcome has been achieved. Another variable is what the participants would have been doing if they hadn't taken part in the activity or event.

Phoenix receives social value as part of its procurement processes and contract management through event sponsorship such as the Phoenix Festival and Community Links, raffle prize donations, work experience placements, painting community centres and contractor attendance at job fairs and school/college career days.

We viewed the social value for key Phoenix activities like the Job Club, Resident Involvement, Community Links, Chat and Chips, Diversity Day and all Community Chest projects. The social return on investment ranged from £0.36p to £43.42, for each £1 invested.

We found that even if the value of a project is at the lower end of the range, it does not mean that the project, event or activity is of low value to the residents that participate. All of the activities and events that Phoenix support or deliver add value to residents and the wider community.



There are several models which can be used to calculate social value, we reviewed them as part of our research. Some of these tools are more difficult to use than others and some are only suitable for certain types of activities or events. The main models used by Phoenix are HACT and Social Value UK Social Return on Investment (SROI).

Recommendations

Our top recommendations

At the end of our review we made three recommendations, these are:

- 1 Consider adding social value as a subject to the Phoenix Academy 9-week course. This will help residents to understand what social value means.
- 2 Develop a stand-alone social value report to enhance transparency and show residents how we are developing the local community and improving residents' lives and wellbeing. More information needs to be provided to residents, the Resident Communications Group could support Phoenix to find different ways to advertise and promote the report.
- 3 Consider signing up to the Centre for Excellence in Community Investment Board Charter to demonstrate Phoenix's ongoing commitment to the community.

Constraints

- We were unable to interview the Head of Community Engagement face to face due to the coronavirus. Our closing meetings and report writing had to be done virtually.
- We were unable to take part in the British Standards Institution consultation on a new quality standard guide for understanding and enhancing social value.

What we've learnt

- How much Phoenix do and how it benefits the local community. We've learnt why it attributes a social value cost to every project possible, and how the amount is worked out per pound spent.
- These benefits may not have been possible to fund if not for the partnership of contractors.



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Traffic light monitoring

To make sure that services are improved for all residents, we monitor recommendations from our previous reviews to track when actions have been completed.

29

49

9 not started

We use a traffic light system to help us:

- red (delayed)
- amber (in progress)
- green (completed)

Phoenix and regulatory standards

At the core of every scrutiny review, we look to improve services for all residents in line with the Phoenix Standards and regulatory code set out by the Regulator of Social Housing.

In this review, we noted that there is not a specific Phoenix standard for social value, but Phoenix keeps the promises made under standard 1 (Resident Involvement & Empowerment), Standard 6 (Value for Money) and Standard 7 (Governance and Financial Viability).

What's next

We are considering how we will carry out reviews in the new Covid-19 environment.

Newer members would like to attend the Level 1 Phoenix Academy when it starts again. We will review other training opportunities as they come up.



The Phoenix Standards are available on the Phoenix website. If you require a hard copy, please get in touch with Phoenix.



More info

This is a summary version of our full report. If you'd like to read the full report, please call 0800 0285 700 or visit the Phoenix website.

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