



Social Value & Wellbeing Impact:

Delivering Community Benefits throughout our communities

1. Legislation in Wales

- 1.1 In December 2021, CWMPAS, formerly the Wales Co-operative Centre (a development agency working for positive change, in Wales and across the UK), were commissioned by the Welsh Government to engage with the Welsh public sector. The aim was to undertake a review into social value in Wales. As part of the report, Cwmpas concluded that there was much confusion in the sector with regards to terminology and reported that the terms 'community benefits' and 'social value' are used interchangeably. One recommendation made was to remove both terms and to replace with 'Wellbeing Impacts' or 'Wellbeing Values' to align with The Wellbeing of Future Generations Act 2015.
- 1.2 Therefore, where reference is made within this document and supporting documents, to the term 'Wellbeing Impacts' this is to be treated in the same way as 'community benefits' and 'social value'.

2. Wellbeing impacts: Delivering Community Benefits

- 2.1 At Trivallis we provide homes for thousands of families in South Wales. We offer support to help people sustain their tenancies, we invest in communities to make them more attractive, and we work hard to create training, volunteering, and employment opportunities for local people.
- 2.2 Being a responsible business is integral to the day-to-day running of Trivallis. This means the way we do business is not just about providing good quality housing. We aim to regenerate the communities we serve and improve the lives of those living there whilst creating long term economic, environmental, and social value.
- 2.3 We recognise that as a large housing provider in South Wales, we have a vital role to play in supporting the Foundation Economy and raising aspirations within our local communities attracting inward investment to those areas that most need it.
- 2.4 Our Vision and Purpose is driven by a strong understanding of the key social issues affecting our customers and communities and ensures that we are best placed to make a real difference. We are prioritising the support for our tenants to help them through the high cost of living crisis, and we can do this with you, our contracted partner, with your support through this partnership.

- 2.5 Through the procurement process, we aim to work with the successful contractor to agree outputs and timescales for Wellbeing impact delivery across our communities.

3. Working with you.

- 3.1 As part of the contract delivery, our contracted partners must provide a Wellbeing impact contribution. Contributions can be implemented in two different ways:

1 - As a direct donation into the Wellbeing investment fund (See the table in section 6 for further information).

or

2 - Contractors may choose to deliver Wellbeing initiatives by support a Trivallis community project. The financial value of the community project initiative to be delivered must meet the contribution value listed against the contract value band as noted in 3.5.

- 3.2 To assist our contracted partners in determining the required wellbeing impact contribution please refer to the table below. The Wellbeing impact contribution will be utilised on a sliding scale dependent on the contract value. This scale is detailed in the below table and is subject to VAT.
- 3.3 Contributions made to the Trivallis Wellbeing investment fund may be eligible for tax deductions. By participating in our wellbeing impact initiatives, your company can not only enhance tenant welfare but also enjoy potential tax benefits.
- 3.4 We recommend consulting with your tax advisor or financial professionals to understand the specific tax implications for your company based on UK tax regulations.

Contract Value Band (per annum)	Estimated Contract Value Per Annum (excluding VAT)	% of Spend	Wellbeing impact contribution required
£10k to £249,999K	£10,000	2.00%	£200.00
£10k to £249,999K	£20,000	2.00%	£400.00
£10k to £249,999K	£40,000	2.00%	£800.00
£10k to £249,999K	£50,000	2.00%	£1,000.00
£10k to £249,999K	£100,000	2.00%	£2,000.00
£10K to £249,999K	£250,000	2.00%	£5,000.00
£250k to £499,999k	£500,000	1.50%	£7,499.98
£500K to £749,999K	£749,999	1.35%	£10,124.98
£750K to £999,999	£999,999	1.25%	£12,499.98
£1m to £1,999,999	£1,999,999	1.00%	£19,999.99
£2m to £4,999,999	£4,999,999	0.75%	£37,499.99
£5m to £10m	£10,000,000	0.50%	£50,000.00

4. Applying the Wellbeing initiatives.

- 4.1 If the agreed-upon contractual obligation involves a project or activity initiated by the contractor for the wellbeing initiative and the contractor fails to deliver, Trivallis will seek financial remuneration equal to the value of the project or activity.
- 4.2 Notwithstanding any other provision of the contract, in the event that the Contractor has not paid the financial contribution, Trivallis will offset any value owed against any monies due.

5. Wellbeing Impact Menu

- 5.1 To align with the Trivallis commitment to wellbeing impact and community benefits, we have developed a **Wellbeing Impact Menu**.
- 5.2 The wellbeing menu of options is designed to support Trivallis in achieving our goals in delivering wellbeing impact values, in accordance with the requirements outlined in our business contracts.
- 5.3 As part of our tender process, we invite bidders to **choose one or more options** from the Wellbeing Impact Menu that they will intend to deliver as part of the wellbeing impact initiative.
- 5.4 These options represent the wellbeing initiatives that your organisation intends to pursue and accomplish as part of fulfilling the Trivallis contract requirements.
- 5.5 Please note that the wellbeing option selected by your organisation will be a condition of contract and will have associated Key performance indicators to ensure effective delivery.
- 5.6 For each year of the contract, on the anniversary date, the successful contractor is required to review and choose **an option (or options)** from the menu to deliver in that specific year once again.

- 5.7 It is crucial to note that failure to select an option will render the tender bid non-compliant, resulting in exclusion from the tender process.
- 5.8 The Community Involvement Team, together with your Contract Manager at Trivallis, will work with you to oversee progress made and measure what has been achieved through community benefit and the impact it has made.
- 5.9 **When bidding for contracts, we would encourage you to make contact during the tender stage to discuss your community benefits response with our Community Involvement Team. We will work with you to develop your own Wellbeing Impact Plan linked to your vision and values and agree a way forward.**

6. Wellbeing Impact Menu of Options (Contracted).

Ref	Option	Explanation	Method of delivery
1	Wellbeing Investment fund	<p>A financial contribution of the contract value invested into the Trivallis' Wellbeing Investment Fund.</p> <p>This fund will be used to support organisations and groups in the community to offer vital support to our tenants and residents</p>	<p>The Contractor is required to contribute to the wellbeing investment fund at an agreed upon timeframe.</p> <p>Contributions can either be:</p> <p>1 - Submitted on a monthly basis.</p> <p>or</p> <p>2 - Submitted on a quarterly basis.</p> <p>Contractors must note that contributions are to be paid on receipt of an invoice from Trivallis and kept separate to the invoices raised for works to Trivallis.</p> <p>On receipt of the Contractor invoice by Trivallis, a contribution invoice will be raised to the contractor one month in arrears.</p>
2		Donation of time, skills and or materials to a Trivallis chosen	

	Community Project	community project, this could be a Time for Change project, or another initiative identified by Trivallis	<p>Community projects can be delivered in the annual contract period to which the initiative is to be delivered.</p> <p>Our partnerships team will work with your organisation to select a community project to support, and to ensure that the contribution meets the wellbeing impact contribution noted against contractual value.</p>
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7. Additional Wellbeing Impact initiatives

- 7.1 In addition to the contracted wellbeing initiatives, we encourage and welcome the involvement of contractor partners in our other community workstreams.
- 7.2 Please note that these additional Wellbeing impact options are optional for our contracted partners and can be undertaken at their discretion.

Ref	Option	Explanation	Method of delivery
1	School and College Engagement	Supporting of initiatives with a local school/s and or college/s. This could contain activities such as: <ul style="list-style-type: none">• Supporting with mock interviews• Offering job opportunities / taster days / assemblies• Offering shadow days / placements• Attending career days• Offering training sessions i.e. health and safety (this could also be run for community members)	The contractor could support with the delivery of activities which support the introduction of 'the world of work' to young people. This may mean involvement such as being part of a pool of volunteers support mocking interviews or holding a stall at a career's day.
2	Support Trivallis' Charity Partner Fundraising events	<ul style="list-style-type: none">• Donate towards one of Trivallis' charity partner fundraising events and / or• Take part in the event i.e. sports game, fitness challenge	<ul style="list-style-type: none">• A cash or other donation (e.g. raffle prizes) could be made to support fundraising activities organised by Trivallis.• In addition to any donations made contractors could take part

			in activities, e.g. a football match or competition
3	Targeted Recruitment and Training (TR&T)	Employment and skills opportunities for the local community and / or tenants	The contractor could deliver a training session or recruit tenants from the local community as part of the contract
4	Targeted Work placements	Offer at least a 1-week placement for a community member to gain general knowledge of the contractor partner	The contract could offer a local community member a 1-week placement in which they shadow a paid employee to learn about the role.
5	Targeted Apprenticeship/Trainee scheme	Offer disadvantaged community members an apprenticeship/trainee place.	Offer of a placement to a community member

8. Our Wellbeing Impact Programme

8.1 Trivallis has a Wellbeing Impact programme which seeks to contribute to the social regeneration of local communities; helping tackle challenges that are affecting our tenants and the wider community and society, particularly the high cost of living crisis.

8.2 The opportunities to support our communities may be through:

Health and Wellbeing – Building stronger, more resilient, and prosperous communities.

Cost of Living Crisis – Help to reduce the impact for our customers through this crisis is a priority for Trivallis.

Digital Inclusion – Helping our customers and communities to get the most out of technology.

Employment Opportunities – Supporting our communities with apprenticeship and job opportunities.

Education, Training and Skills – Support our communities to achieve their potential to upskill with opportunities of work experience and educational site visits.

Employee Volunteering – *Time for Change* is an initiative run by Trivallis where employees and volunteers from partner organisations give up their time and skills to make real changes to the lives of people across our communities. Through our Trivallis Time for Change initiative, our employees and supply chain partners can give something back to local communities. We often require support from partners in the form of materials, donations and in-kind labour to deliver tangible improvements for our estates and communities.

Trivallis hosts case studies for our community benefits programme, and we invite suppliers to visit our website to learn more -

9. Get in touch:

9.1 We are looking forward to working in partnership with you as our contracted partner to deliver our Wellbeing Impact programme.

9.2 To find out more about our approach to responsible business or discuss your ideas for delivering extra value to our local communities, please contact:

Sarah Protheroe - Procurement Manager

Email: sarah.protheroe@trivallis.co.uk

Lisa Roberts - Community Benefits Partner

Email: Lisa.Roberts@trivallis.co.uk

Telephone: 07799132237

Jen O'Hara Jakeway - Head of Community Involvement

Email: Jen.OHaraJakeway@trivallis.co.uk

Telephone: 07766984578