



COMMUNITY
OWNERSHIP
SUPPORT SERVICE

Development Trusts Association Scotland

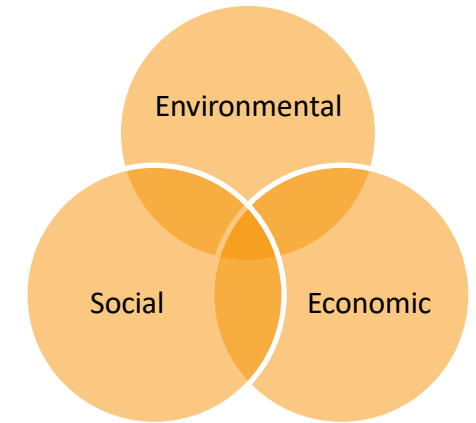
Evidencing Social Value in Asset Transfer

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SOCIAL VALUE & ASSET TRANSFER

What is Social Value?

“Social value is the quantification of the relative importance that people place on the changes they experience in their lives. Some, but not all of this value is captured in market prices.” Social Value UK



How does Social Value impact on asset transfer?

Social Value is an important factor when a Relevant Authority is considering whether to approve an asset transfer

- Social Value is part of the assessment of whether a community has justified the discount requested
- Social Value can help compare a request for asset transfer with an alternative proposal (from the relevant authority or another community)

ASSET TRANSFER – BELOW MARKET VALUE

Scottish Government [Guidance on Asset Transfer](#)

*“When the price offered in an asset transfer request is less than the market value of the property, the relevant authority will need to consider whether the **proposed benefits to be delivered by the community transfer body justify the proposed discount** (which will be accounted for as a “gift”)*

*“Asset transfer at less than market value is justified when these additional benefits empower communities and align with local and national priorities to enable the **delivery of Best Value across the public sector as a whole**”*

ASSET TRANSFER – AREAS OF BENEFIT CONSIDERED

Economic
development

Regeneration

Public health

Social
wellbeing

Environmental
wellbeing

Reductions in
inequalities of
outcome

Any other
benefits

Social Value



TYPES OF BENEFIT CONSIDERED IN ASSESSMENT OF ATR

Financial

Direct financial savings as well as reductions in public sector costs or enhancement of provision due to the proposal

- Preventative & early intervention activity that reduce the need for acute services that cost the public sector £
- Such as physical health improvements from sporting activity help prevent illness, reducing costs to NHS
- Using studies of impact in similar projects as basis for calculation

Outcomes - Quantitative

Contribution towards local or national priorities

- Outline a range of outcomes from your project
- Link those outcomes to National Performance Framework, Local Outcome Improvement plans and national thematic strategies to show how they contribute

Outcomes - Qualitative

Improved community cohesion; enhanced local services; pride in community etc.

- Improved confidence, trust, relationships, sense of pride, being part of something
- Demonstrate with Case studies of how project has or will improve people's lives
- Can often be the most important impact of the asset transfer

Social Value

HOW IS SOCIAL VALUE ASSESSED?

- Assessment of Social Value varies across Relevant Authorities with each having a unique approach
- Most Relevant Authorities will use a Scoring Matrix

Table 2: Forest Enterprise Scotland Best Value Assessment

Market Value Differential Requested	Overall project score	
	Low	High
£0		
	<p>Limited public benefit identified unlikely to provide rationale for reduction</p>	<p>Significant benefits, but major impact on programmes</p>
	<p>Benefits likely to be sufficient to demonstrate best value</p>	<p>Benefits likely to demonstrate best value</p>
	<p>May not demonstrate best value – review options and set out terms and conditions in decision</p>	<p>Low differential – benefits likely to demonstrate best value</p>

COMMUNITY ASSET TRANSFER SCHEME (CATS): EVALUATION PANEL TEMPLATE

ASSESSMENT CRITERIA	ASSESSMENT	SCORING GUIDANCE	NEGATIVE IMPACT		POSITIVE IMPACT					WEIGHTED SCORE
			Critical	Potential to mitigate	No evidence 0	Very low 1	Low 2	Mod-erate 3	Strong 4	
BENEFITS Overall best value weighting 50%										
1. Vision	To what extent do the overall vision for the project and the project outcomes contribute to Scotland's National Outcomes?	Very strong proposals will make a major contribution to several national outcomes, deliver transformational benefits to the community, with significant public benefit, and demonstrate clear evidence of benefits and steps it is taken to contribute to equalities outcomes.								
2. Financial	Will the project have an overall financial benefit on public sector costs and/or enhanced provision of public benefits?	Very low impact proposals will make a limited contribution to national outcomes and have a small positive effect on community benefit.								
3. Non-financial benefits	What is the impact of any non-financial benefits, including economic development, regeneration, public health, social wellbeing, environmental wellbeing, inequalities of outcome, any other benefits?	Proposals may receive a negative ranking if they are likely to impact on the communities capacity to deliver other activities, or have a negative impact on parts of the community.							5	10
4. Equality	What evidence has the organisation provided of how it will take into account the different needs of the community, and what contribution will the project make to equalities outcomes?									
VIABILITY Overall best value weighting 30%										
5. Leadership	Is there a clear plan and leadership in place for achieving the project outcomes?	Very strong proposals will have clear plan, with leadership and other roles clearly identified, clear governance in place, evidence that the level of resources and community capacity is appropriate to the scale of the project, a longer-term plan and appropriate reporting and monitoring process.								
6. Governance and accountability	Are appropriate governance structures and policies in place, and what impact will they have on the viability of the project?	Very low impact proposals are likely to have show little evidence of their capacity to deliver the benefits identified.								
7. Use of Resources	Has the group identified all the resources required, such as funding, staff and volunteer resources with the appropriate skills, and are they sufficient to deliver the project? Has the group demonstrated that the resources are sustainable over the lifetime of the project?	Proposals may receive a negative ranking if there is no governance in place, with no clear responsibility for delivery or a lack of resources and sustainability which is likely to lead to project failure, particularly where this may create a liability for the community or for the National Forest Estate.								
8. Sustainability	Has the group set out evidence of how it the project will be funded in the longer-term, e.g. through future funding or self-finance, and what impact does this have on the long-term viability of the project?								5	6
9. Performance Management	How does the group propose to monitor and report on the achievement of the desired outcomes, including use of resources and delivery of outcomes?									
TOTAL										60

Roots & Growth: Theory of Change

Inputs

- Resources*
 - Time
 - Staff
 - Volunteers
 - Financial resources
 - Expertise
 - Physical resources (Littleburn itself)
- Activities*
 - Community: drop-in space; space hire; workshops.
 - Health & Wellbeing: hosting support services; therapies inc. holistic health.
 - Art & Creative: Workshops, residencies.
 - Growing & Food: Growing projects, meals, classes.
 - Accommodation for visitors.
 - Supporting volunteers.
 - Collaborating with other organisations.

Outputs

- For the Community*
 - 500 local people access community activities at Littleburn.
 - 500 local people attend workshops/classes.
 - 50 local people access high quality volunteering placements.
 - 2 direct new jobs are created for local people.
- For Vulnerable People*
 - 250 people access support services hosted at Littleburn.
 - 100 receive therapies at Littleburn.
- For the Environment*
 - 100 local people engage in growing projects.
 - 30 local people take part in repair /reuse activities.

Outcomes

- For the Community*
 - Local people have more and better opportunities to develop skills, socialise and come together.
 - Local people feel less isolated or lonely.
 - Health and wellbeing of local people is improved.
 - Community cohesion is improved, including between generations; and with incomers to the community.
 - Local volunteering enables more control over the delivery of services.
 - Volunteers are well supported.
 - The community owns a sustainable asset run by local people, with income reinvested locally.
 - Tourism is developed sustainably in line with the local Strategy.
- For Vulnerable People*
 - Support services are hosted in a therapeutic environment.
 - People have help to overcome trauma and ACEs.
 - Vulnerable people have better social connections.
- For the Environment*
 - Local people feel better able to address the climate emergency.
 - Strengthens peoples' connection to the land and nature.

Impacts

- For the Community*
 - Knockrain is a cohesive community within the Black Isle.
 - Local people are healthy and happy with good social connections.
 - There are opportunities to learn and develop new skills.
 - The impact and benefits of volunteering are recognised.
 - People have more influence on how services are delivered.
 - The community is stronger and more resilient, owning a sustainable asset.
 - Job opportunities locally are improved.
 - The area is a destination for sustainable, responsible tourism.
- For Vulnerable People*
 - Vulnerable groups are more integrated into the community.
 - Vulnerable people are supported and treated with dignity.
 - The value of these therapies and supports are recognised in the community. tackling stigma.
- For the Environment*
 - Knockrain and the Black Isle are resilient and prepared for the impacts of climate change.
 - The cultural heritage of connection to nature is celebrated and preserved.

Example

Logic Model

Shows clear path from inputs through to impact

Initiative	Description	Benefits & Outcomes	Locality Plan Priority
Transforming Lives for Good (TLG)	School based coaching for children struggling to integrate into school life.	Reduce the educational attainment gap, improve attendance at school.	#2 Closing the attainment gap
BFriends	Befriending Scheme for children who are lonely or lacking good role models.	Reduced sense of isolation and increased engagement with community.	#1 Stronger communities. #4 Wellbeing (mental health).
Child Welfare Support	Assessing needs and risks faced by children in chaotic families.	Intervention for the benefit of children where home environments have become harmful.	#4 Wellbeing (physical and mental health)
Drop In	Drop in groups for men and women who are lonely, struggling with addiction or other lifestyle issues.	First point of contact for individuals to access support and begin to address personal issues.	#1 Stronger communities. #3 Safer communities.
Foodbank	Partnership with Trussell Trust to deliver a wide range of food to those in need.	Practical support with the offer of support and counselling to address the root cause of food poverty.	LOIP outcome #13 Eradicate food poverty by 2026
Emergency Funding	Small scale financial assistance in the form of electricity tokens or similar.	Allows individuals to heat their home, or assistance with other basic necessities.	#4 Wellbeing and resilience (increased crisis resilience)
Crisis Counselling	Counselling for those in crisis, by people trained in areas such as suicide prevention and addiction.	Intervention to help avoid escalation in the crisis of an individual.	#4 Wellbeing and resilience (mental and physical health)

Table 1 Crisis Intervention Initiatives

Example

Simple table demonstrates links between community activities and local priorities

EXAMPLE - ANTERMONY DEVELOPMENT TRUST (ADT)

- ADT Asked to purchase Antermomy Loch from East Dunbartonshire Council for £10,000 – valued at £50,000
- Required to justify £40,000 'Gift' through Social Value delivered

Financial

- Social Value - financial estimate calculated: £83,723
- Preventative reductions in social isolation and improvements in mental health
- Based on Westhill Men's Shed SROI
- Adjusted figures based on differences in activity, numbers and outcomes
- Prepared by a Professor of Economic Sociology and Social Policy – ADT Secretary

Qualitative outcomes

- Case Studies
- 4 stories of people attending
- Showed how the project had improved the individuals lives in ways that are hard to capture
- Project provided people with time and space to think, peer support, supportive environment, connection to nature – led to reductions in stress, increased pride, sense of worth

Social Value



TIPS FOR DEMONSTRATING SOCIAL VALUE

- Work with your COSS Advisor on demonstrating your benefits
- Be clear about your outcomes and link them clearly to LOIP and NPF outcomes
- Learn from other groups by reading their ATR for ideas
- Ask to see the Relevant Authorities Scoring Matrix
- Forecast your volunteer hours and assign a financial value
- Use the tools available to help you – i.e. Good Finance, Outcomes Matrix
- Look out for impact studies of similar interventions – i.e. Westhill Men's Shed SROI



Q&A and DISCUSSION

TOOLS & RESOURCES

- COSS Website – Information and advice for communities on [writing your Asset Transfer Request](#)
- COSS [Webinars](#)
- Scottish Government – Asset Transfer [Guidance](#) for Communities
- Scottish Land Commission – Vacant & Derelict Land [Impact Tool](#)
- Good Finance Project – [Outcomes Matrix](#) Tool
- Social Value Lab – [Agency](#) with expertise in Social Impact Measurement
- Social Value UK – Information, guidance and [resources](#)