

Wheatley Group

Community Benefits Statement

2025

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در صورت درخواست، می‌توانیم اطلاعات را در چاپ بزرگ، خط بریل، روی نوار یا در فرمت غیرنوشتاری دیگری ارائه دهیم. همچنین می‌توانیم اطلاعات را به سایر زبان‌ها ترجمه کنیم. در صورت نیاز به اطلاعات بیشتر در هر یک از این فرمت‌ها، لطفاً از طریق شماره 0800 479 7979 با ما تماس بگیرید یا ایمیلی به info@wheatley-group.com ارسال کنید.

ہم درخواست پر معلومات کو بڑے حروف، بریل، ٹیپ پر یا کسی اور غیر تحریری صورت میں بغیر کسی لاگت کے مہیا کر سکتے ہیں۔ ہم اس کا دوسری زبانوں میں ترجمہ بھی کروا سکتے ہیں۔ اگر آپ کو ان میں سے کسی صورت میں یہ معلومات درکار ہوں تو

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Schedule of Definitions

Community Benefits Terminology	Definition
Priority Group	<p>A person belonging to one or more of the following categories:</p> <ul style="list-style-type: none"> ▪ longer-term unemployed people (6-months or over) ▪ people accessing welfare benefits; ▪ people with disabilities; ▪ lone parents; ▪ people who have experienced homelessness; ▪ people who have criminal convictions; ▪ people who have a history of addiction; ▪ BME groups; ▪ veterans.
New Entrant	<p>A person belonging to one or more of the following categories:</p> <ul style="list-style-type: none"> ▪ leaving an educational establishment or a training provider ▪ is currently unemployed and is seeking employment (regardless of whether they have previous experience in the field or not). ▪ beginning, or part way through a Modern Apprenticeship ▪ or newly recruited on another type of trainee contract and is receiving on-site training and assessment or offsite training, or a mix of these.
Supply Chain Development	The supporting of activities that remove barriers to participation in supply chain opportunities for supported businesses, SMEs, social enterprises, and the third sector.
Social Enterprises	Independent businesses that deliver social and/or environmental goals/services. Surpluses are reinvested back into their social and environmental purposes.
Small and Medium-sized Enterprise (SME)	<p>A small or medium-sized enterprise with fewer than 250 employees and a turnover of less than £36 million. They are further categorised as:</p> <ul style="list-style-type: none"> ▪ Micro – 1–9 employees; ▪ Small – 10–49 employees; ▪ Medium – 50–250 employees;
Supported Businesses	Supported businesses are defined as organizations whose primary objective is the social and professional integration of disabled or disadvantaged persons.
Wheatley Foundation (The Foundation)	The charitable trust of the Wheatley Group. It focuses on two main priorities: maximizing access to employment, training, and learning opportunities, and tackling social exclusion and alleviating the impacts of poverty.
Third Sector	The term covers a wide range of community groups, voluntary organisations, charities, social enterprises, co-operatives, and volunteer organisations that exist wholly or mainly to provide benefits for society or the environment.

1 Introduction

1.1 Owning or managing over 95,868 homes, Wheatley Group (the Group) delivers award-winning services to over 210,000 people across 19 local authorities in Scotland. Wheatley employs 2700 people directly and a further 2000 as joint owners of one of Scotland's largest repairs and maintenance companies, City Building (Glasgow). The Group's partner organisations remain firmly rooted in their local communities whilst drawing on the strength, size, scale and resources of the Group. This helps them contribute on a regional and national level to affordable housing, care and community regeneration across Scotland. Subsidiaries include Wheatley Homes Glasgow, Wheatley Homes East, Wheatley Homes South, Loretto Housing Association, Lowther and Wheatley Care.

1.2 This Community Benefit Statement supports Wheatley Group's Procurement Strategy 2024 - 2026 and the Group's Sustainability Policy 2025. It ensures compliance with Sections 24 and 25 of the Procurement Reform (Scotland) Act 2014, which sets out a requirement to:

- consider community benefits requirements in public contracts which are regulated procurements over the value of £4 million
- include a summary of the community benefit requirements in the contract notice or, where not included, a statement of reasons for not including such requirements.

Wheatley Group considers that delivering community benefits is a core part of contract compliance.

1.3 The Group is committed to maximising community benefits for its customers and communities through its procurement activities. This will be achieved through the inclusion of specific community benefits requirements in Wheatley Group procurement contracts, known as Community Benefit Requirements.

2 What are Community Benefits?

- 2.1 Community benefit requirements are contractual requirements which deliver wider social benefits in addition to the core purpose of a contract. The requirements can be used to build a range of social, economic, or environmental conditions into contract delivery. As an example, this can include provision of jobs and training places for particular groups; or donations of goods, equipment, or expertise to support local community activities.
- 2.2 Scottish Government Procurement Guidance suggests that community benefit requirements to be considered in public procurements may include (but are not limited to) the following:
 - generation of employment and training opportunities,
 - vocational training, up-skilling, equality initiatives,
 - small and medium sized enterprises (SME) / supply chain / third sector development,
 - building capacity in community organisations,
 - educational support initiatives, work experience,
 - minimising negative environmental impacts.
- 2.3 Where appropriate, non-contractual voluntary community benefits may also be sought on a case-by-case basis, where there is deemed a potential to derive positive community outcomes via existing contracts.

3 Community Benefits Legislation

- 3.1 The Scottish Government envisages that enacting community benefit requirements will contribute to achievement of a range of National and Local Outcomes which promote employability, skills development and tackling inequality. The Procurement Reform (Scotland) Act 2014 aims to increase the use of community benefits within public contracts and framework agreements
- 3.2 Under section 25(1) of the Act, as noted it is a legal requirement that community benefit requirements are considered for all regulated procurements with an estimated value of £4 million or more. The Scottish Government has indicated that the £4M threshold may be reviewed in future, as community benefits may potentially be achieved in lower-value procurements.
- 3.3 In line with Sustainable Procurement, the Scottish Government Guidance advises that community benefit requirements should:
 - be used where deemed appropriate,
 - be proportionate, and that requirements should not place a disproportionate burden on economic operators,
 - not result in unintended effects such as displacement of existing contractor employees.
- 3.4 The Guidance recognises that training and employment opportunities require an adequate contract length to be undertaken successfully and that, while activities

such as mentoring or curriculum support may be delivered via lower value contracts, most community benefits will derive from higher value, longer term contracts.

- 3.5 Overall considerations should include how procurement can improve the economic, social, and environmental wellbeing of areas or target groups and facilitate the involvement of small and medium enterprises, the third sector and supported businesses in supply chains.
- 3.6 The formation of the Group's Community Benefit Statement takes note of Scottish Government Guidance, legislation and the need for requirements to be proportionate. To this end, the Group's community benefit requirements will be included in contract specifications and will form part of procurement selection and award procedures where relevant.

4 Group Approach to Community Benefits

- 4.1 Community benefits are now considered for inclusion in all relevant Group procurements including Works, Goods and Services contracts. Group requirements seek to maximise benefit to Wheatley Group customers, communities, and neighbourhoods, expanding and targeting the types of community benefits sought and contractually requiring community benefits across all types of suppliers.
- 4.2 Community benefits support the Group's goal to support economic resilience across Wheatley communities, creating jobs and boosting customer access to training and quality, sustainable employment opportunities. This also supports the Group's equality, diversity and inclusion goals, helping to ensure our Community Benefit approach is inclusive. Our community benefit requirements extend across all Wheatley neighbourhoods. In line with the legislation, suppliers are also asked to open-up supply chain opportunities to SMEs, supported businesses and social enterprises.

5 Wheatley Foundation

- 5.1 To support community benefit aims, Group Procurement work closely with business leads and the Group's charitable trust, the Wheatley Foundation: www.wheatley-group.com/better-lives/wheatley-foundation/the-foundation-story.
- 5.2 The Foundation, focus on two main priorities:
 - maximising access to employment, training and learning opportunities
 - tackling social exclusion and alleviating the impacts of poverty.

- 5.3 Wheatley Foundation delivers customer-focused programmes and invests in Wheatley communities to help create local opportunities, remove barriers and increase access to employment, education and wider wraparound services which help build lasting resilience and improve quality of life. All Foundation programmes support these goals and demonstrate benefits to Group customers.
- 5.4 Maximising job and training outcomes for customers remains a key community benefit priority. To support this, the Foundation runs the Wheatley Works programme, helping prepare customers for training, work experience and job opportunities, arising from a range of employability activities, including community benefit requirements. [Employability - Wheatley Works | Wheatley Group \(wheatley-group.com\)](#)
- 5.6 Through Wheatley Works, the Foundation has partnered with our group construction contractors to develop pathways, aimed at supporting customers into employment in construction.

6 Threshold Values

- 6.1 The Group considers including community benefit requirements when tendering a supply and/or services contract at the contract threshold values noted below:

Community Benefit	Contract Type	Contract Value	Community Benefit Requirements
Contractual	Framework	> £500k	Retrospective, based on spend
Contractual	Works Contract	> £2million	Mandatory or evaluated
Contractual	Goods / Services	> £500k	Mandatory or evaluated
Voluntary	Any – e.g., may apply to existing contract with no current CB requirement	> £500k	Negotiated where appropriate

- 6.2 For most types of work, the number and value of community benefit requirements sought is dependent on contract financial value bandings. These are set out in the Group's Value Tables for Construction ([appendix 1](#)) and for Goods and Services ([appendix 2](#)).
- 6.3 While there is no requirement to consider or include community benefits within contracts with values below the relevant thresholds, where applicable, the use of voluntary community benefits may be explored to maximise community and customer outcomes.

7 Contractual Community Benefit Requirements

- 7.1 Community benefits are included within procurement activity on a Contractual or Voluntary basis. Contractual community benefits are included in procurement processes as Mandatory or Evaluated requirements. They form part of contract conditions and contractors are required to deliver their commitments with appropriate clauses included in the contract.
- 7.2 All contractual community benefit requirements must be stipulated in Contract Notices and, where applicable, will be included in all relevant procurement documentation at tender stage, and as relevant throughout the procurement process in order that they may form part of contractual requirements and KPI monitoring.
- 7.3 Quantified Contracts – Where contract value and outputs are quantified and known at the outset, community benefits will be assessed prescriptively via Mandatory requirements or assessed based on agreed Evaluation criteria.
- 7.4 Where Mandatory and Evaluated community benefits are included within tenders, they will form part of the quality criteria. Weighting of community benefits requirements will be agreed and applied on a case-by-case basis but is likely to range from 5-15% of the quality score.
- 7.5 Failure to respond to the Mandated or Evaluated quality section may result in tenders being non-compliant and rejected unconditionally.
- 7.6 As part of our new build framework, each new build contractor is required to provide a charitable donation of £775 per new build unit to the Wheatley Foundation. The total value of the charitable donation is agreed during the tender process, with payments made at week 26 of site development, or sooner if the development is not on-site more than 26 weeks. This financial contribution adds value by: supporting Foundation to deliver employability, social and financial inclusion programmes, and activities for children and young people; supporting and funding local projects through our Greener Communities programme including relevant to the themes of community growing, food waste reduction, the circular economy and active travel.

Where contract values and outputs are less predictable or are variable (for example Framework agreements), where appropriate the Group will consider the inclusion of contractual, retrospective community benefits. For example, when drawing on Framework suppliers, the Group may seek community benefits to be delivered retrospectively, based on spend ([appendix 2](#)).

Examples
Mandatory – Specified Requirements: <p>At tender stage, the Procurement Team will provide the relevant Community Benefit Value Table and guidance for each contract within the Contract Notice. The Value Tables include specific community benefits requirements dependent on contract value. Bidders are required to sign this to demonstrate compliance with the community benefit requirements specific to the relevant value band for the contract.</p> <p>As a Mandatory requirement, this is not evaluated but is scored on a compliance pass / fail basis.</p> <p>As different types of community benefits are likely to be obtained from different contract types, quantified requirements will be based on contract values set out in 2 distinct Value Tables for:</p> <p>a) New Build/Construction works types (appendix 1)</p> <p>b) Goods and Services (appendix 2)</p>
Evaluated Requirements: <p>Community Benefit is included as part of contractual obligations and evaluated as part of the tender process. At tender stage, the Procurement Team will provide community benefit guidance and agreed community benefit questions, which the bidder must answer, which will be weighted and scored as part of the bidder's submission.</p> <p>The Group may request Community Benefit Method Statements for each contract within the contract notice, which will set out community benefit proposals submitted by the contractor.</p>

The Group is required by the **Procurement Reform (Scotland) Act 2014** to produce and publish an Annual Procurement Report. This must include a summary of any community benefit requirements included in contracts and fulfilled during the year which will be published on the Group website.

There may be instances where community benefit requirements are not appropriate for inclusion in a contract. The Group will always consider their use by examining the contract's nature, its duration and local factors. Where the Group decides not to include any community benefit requirements, we will include a statement of the reasons for this in the Contract Notice, as required of any public contract over £4 million that does not include community benefit requirements.

8 Monitoring, Partnership & Communication

- 8.1 The Group works with contractors and suppliers to deliver agreed, proportionate community benefits that provide added value and create opportunities for our customers and communities. Monitoring and reporting on these requirements allow us to:
- demonstrate that we, our partners and supply chain are making a positive difference to individuals, enhancing communities and supporting wider economic resilience;
 - report each year to the Scottish Government on Community Benefits delivered as part of Annual Procurement reporting requirements;
 - promote and share best practice.
- 8.2 Group contractors and suppliers are expected to support activities which develop and widen supply chain opportunities within contracts to the third sector, supported business and SMEs. This may be delivered through mentoring, training, partnership work, events and placing work with such suppliers. Suppliers also have a role to play in building capacity within communities, e.g. by mentoring young people in schools or coaching customers seeking work.
- Where feasible, the specific community benefits required will be agreed as appropriate to supplier type and specialism. Specific requirements may be included within contracts dependent on local needs, determined on a case-by-case basis.
- 8.3 It is the responsibility of the Contract Owners to ensure that community benefit requirements are fulfilled as detailed within the Contract Supplier Management Guidance Document. Ensuring that these benefits are realised is a crucial part of contract compliance. Contract owners must diligently monitor and report on the community benefit requirements, ensuring they are fulfilled. This can be recorded on the CMS and reported on by the Foundation. This responsibility is essential to support the Wheatley Group's goals of maximising community benefits and contributing to the economic, social, and environmental wellbeing of the communities we serve.
- 8.4 Lessons learned and Wheatley success stories will be shared in the Annual Procurement Report, in quarterly reporting to the Foundation Board and through internal and external communications channels. Partnership working with contractors and suppliers to deliver community benefits will also support contractors' Corporate Social Responsibility objectives, providing further opportunity to recognise and celebrate a wide range of individual and community impacts.

APPENDICES

APPENDIX 1

NEW BUILD CONSTRUCTION – COMMUNITY BENEFIT VALUE TABLE

This contract has been identified as having a total value of £_____ and your company and your subcontractors agree to comply with the Community Benefit requirements corresponding to this value, as set out in the table below.

Yes we confirm compliance ☐ ()

No we are unable to comply ☐ ()

Community Benefits minimum requirements:		Band 1	Band 2	Band 3	Band 4	Band 5	Band 6	Band 7	Band 8	Band 9
		£2m- £4m	£4m- £6m	£6m- £8m	£8m- £10m	£10- £12m	£12m- £14m	£14m- £16m	£16m- £18m	£18m+
1	Work placement opportunities (16 plus years) provided – no. Priority Group (New entrant) individuals	3	6	7	8	9	10	11	12	13
2	Other training places for Priority Groups (New Entrants)	1	1	1	2	3	4	4	5	6
3	Total Apprenticeship starts - no. individuals	2	2	3	4	5	6	7	7	8
4	Priority Group (New Entrant) Apprenticeship starts - no. individuals	1	1	2	2	3	4	4	4	5
5	Existing Apprenticeships – no. individuals	3	3	4	5	5	5	5	6	6
6	Apprenticeships completed – no. individuals			1	2	2	3	3	4	4
7	New jobs created on project	2	4	5	5	6	7	8	9	10
8	Jobs taken up by priority groups (New Entrants) – no. individuals	1	2	2	2	3	3	4	5	5
9	Up-skilling – vocational training qualifications achieved by priority groups (New Entrants) – no. individuals	1	2	2	2	3	3	4	5	5
10	Graduates – no. individuals employed or provided with paid work experience			1	1	1	1	2	2	2
11	Mentoring, school and educational support activities	1	1	2	2	3	4	5	5	6
12	Supply Chain development activities & SME, 3 rd sector, Supported Business & Social Enterprises support	1	2	2	3	3	4	4	5	5
13	All Bands – Charitable Contribution to Wheatley Foundation of £775 per each unit									

Contractor Signature _____ Date _____

APPENDIX 2

GOODS AND SERVICE – COMMUNITY BENEFIT VALUE TABLE

This contract has been identified as having a total value of £_____ and your company and your subcontractors agree to comply with the Community Benefit requirements corresponding to this value, as set out in the table below.

Yes we confirm compliance ☐ ()

No we are unable to comply ☐ ()

Community Benefits minimum requirements:		Band 1	Band 2	Band 3	Band 4	Band 5
		£0k- £100k	£100k- £250k	£250k- £500k	£500k- £1m	£1m+*
1	Work placement opportunities (16 plus years) provided – no. Priority Group (New entrant) individuals				1	2
2	Other training places for Priority Groups (New Entrants)			2	2	4
3	Total Apprenticeship starts – no. individuals					1
4	Supply Chain development activities & SME, 3 rd sector, Supported Business & Social Enterprises support		1	2	2	3
5	Mentoring, school and educational support activities		3	3	4	4
6	Community Activities or donation to Wheatley Foundation	1	2	3	4	5

*

Contractor Signature _____ Date _____

**If the anticipated contract value exceeds £2 million, these terms should be tailored to the specific conditions outlined in the contract partic*

