

Invitation to Tender

For

XXXXXXXXXX

Social Value Guidance



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Evaluation of Social Value Requirement – Information for Bidders

1. Introduction

This Section sets out the methodology that South Gloucestershire Council will follow to evaluate Social Value offers from bidders as part of this procurement. **Please note that Bidders MUST read the ‘Dos and Don’ts’ for Social Value Bids set out at Appendix A before submitting any Social Value offers.**

Generic Social Value Portal User Guidance Document is available at:
<https://socialvalueportal.force.com/sArticle?id=a060K00001JRIO8>

2. Social Value Bid Submissions

Overall Approach

Proportionality

Bidders are free to make a commitment against any measure described within the TOMs matrix. Bidders are not required to submit a Social Value offer against each measure, only those that Bidders consider their organisation is best placed to offer given the nature and value of the contract.

None of the measures are mandatory and bidders should ensure that their proposals are relevant and proportional to this contract. The proposal must be proportional to the overall contract value (for example, social value bids that are in excess of 100% of the contract price are unlikely to be deliverable).

NOTE:

- i) Bidders’ social value offers should relate to this contract only. Social value or corporate social responsibility initiatives being delivered elsewhere must not be included in your social value proposal and must represent additionality for this contract – i.e. if you are already delivering volunteering with a local charity you cannot include that as a target but you can include any additional volunteering that you will deliver should you be awarded this contract
- ii) Core requirements of the contract cannot be counted as social value – i.e. if the contract requires supporting people back to work you cannot claim social value for getting people back to work as that is a deliverable of the core contract
- iii) targets must be provided for the total duration of the initial term of the contract only – i.e. not including any potential extension periods. The provision of social value for any extension periods will be agreed at the time of the extension
- iv) it is important that bidders be confident of their ability to deliver Social Value proposals made, as South Gloucestershire Council will contractualise these commitments with the winning bidder which will then be monitored and reported on periodically.

South Gloucestershire Council recognises that measuring and delivering Social Value requires flexibility and a collaborative approach. Agreed Social Value commitments may require a certain amount of refinement as a result. A key requirement is the willingness of the contracting partner to work openly and transparently with the Authority whilst bearing in mind that the overall value of Social Value commitments made must be delivered by the winning contractor.

Accessing the Social Value Portal

The social value bid submission must be made via the Social Value Portal. Bidders should use the link contained within the Invitation to Tender document to register on the portal.

Once you have submitted your registration, you will receive an email to confirm that you have successfully registered for the tender or that there was an error with your registration. Should there be an error with your registration the Social Value Portal Support team will review your registration and resolve any errors or contact you within one working day.

If you do not already have Social Value Portal login credentials, you will be sent an email containing your username and a link to set up your password.

Please note:

- I. The password setup link will expire within 48 hours of being sent; if you need a new password setup link, please click here: [Forgot Your Password](#) and use your existing username to reset your login credentials
- II. If you do not receive a password setup email, please check your spam/junk mail folder
- III. Your username will be in the format: [firstname.lastname@socialvalueportal.com](#)

Please allow at least one working day to receive your login credentials. Once your details are checked and approved, an account will be set up for you, and details will be sent via the email address you provide.

Remember that filling in your Social Value responses will require time and preparation, including specific quantified measures with supporting qualitative submissions as required.

Your SVP response/submission must be done online via the SVP. You can save your work and repeatedly return to progress your submission, but it is not possible to download the content to work on it offline and then upload your commitments.

The deadline for making your final submission through the SVP is the same as the tender deadline. No extensions will be made to deadlines due to any bidder being unfamiliar with the portal or allowing insufficient time for uploading and submitting their social value documents.

Any queries/clarifications regarding the Social Value criteria or tender requirements must be directed via the Council's procurement portal [Supplying the South West](#), through the message function. However, if you need technical support with the SVP itself, please email the SVP directly at support@socialvalueportal.com. The SVP support team are available between 09:00 and 17:00, Monday to Friday. Please allow **one working day** for responses from the SVP.

Quantitative Social Value Proposal

Bidders will be provided with online access to the set of TOMs that South Gloucestershire Council has developed for this project through the Social Value Portal. Bidders are required to complete and submit a response through the Social Value Calculator in line with the deadline for tender submissions. The completed Calculator forms the basis of the quantitative element of the Social Value Proposal.

For assistance with calculating targets for certain measures bidders should use the Unit Toolkit on the Portal. The Unit Toolkit is available through the Social Value Calculator: <https://socialvalueportal-c.um5.visual.force.com/apex/unittoolkit>

TUPE:

Local Jobs (NT1):

Bidders should record new and existing local jobs that are created or sustained directly as a result of this contract only. This refers to the employees on the contract rather than their job role.

Contract Value

The supplier page on the Portal includes a box for bidders to enter an estimated contract value. However, for this contract, bidders are not required to fill in this box.

Local

Please note that social value commitments should be appropriate to the local area. For South Gloucestershire Council, 'local' is defined as being within the Council area.

Qualitative Social Value Proposal

Bidders are to provide evidence against each Social Value commitment to explain how each commitment will be delivered.

The Qualitative Social Value Proposal will consist of the following:

i) Description/evidence box

For procurements to a value up to £250K Bidders must accompany input target figures for specific Social Value measures with a rationale for each Social Value proposal in the Description/Evidence Box in the Calculator which demonstrates that they have credible processes in place to deliver what is being offered. The rationale should also specify whether this value will be delivered directly by the bidder or through its supply chain. **Please note the description field on the Portal has a limit of 255 characters however bidders can attach additional supporting information if required.**

Bidders are to note that the information submitted by bidders in the Description/Evidence Box on the Calculator will be used in evaluation to verify the quantitative values submitted by bidders and to ensure they meet the parameters set out below.

ii) Delivery Plan

The aim of the Delivery Plan is to enable evaluators to determine whether bidders are properly resourcing, managing and are capable of delivering their Social Value offer.

Option 1. For procurements valued between £250K and £500K

In addition to completing the Description/Evidence boxes for the individual targets as set out in (i) above, Bidders are to also provide a Delivery Plan setting out their overall approach across all targets to deliver social value by providing the following information:

- The name of the person who will be responsible for delivery of the Social Value offer made by your company, details of how social value delivery will be managed in the organisation and resources that will be deployed
- Bidders should provide clear evidence that they can identify, source, deliver and report on each target they have set.
- Bidders should include the timeline for delivering the social value offer.
- What are your internal processes in the event that something goes wrong i.e. how will any non-delivery of offers made, or poor quality be escalated internally and addressed?

Please note that a word limit of 2,000 words applies to Delivery Plans.

Or

Option 2. For procurements valued over £500K

- Bidders should provide the name of the person who will be responsible for delivery of the Social Value offer made by your company, details of how social value delivery will be managed in the organisation and resources that will be deployed
- Bidders should set out their broad approach under each theme and explain how they will make the best use of the opportunities created through the procurement to contribute to the delivery of sustainable social value outcomes
- Bidders should provide clear evidence that they can identify, source, deliver and report on each target they have set.
- Bidders should include the timeline for delivering the social value offer.
- What are your internal processes in the event that something goes wrong i.e. how will any non-delivery of offers made, or poor quality be escalated internally and addressed
- For projects that extend beyond 24 months, bidders should include an explanation of how they will progressively improve and expand the delivery of Social Value outcomes over the life of the project and what continuous improvement targets it plans to set.
- What are your processes for engagement and collaboration with relevant local stakeholders in the delivery of Social Value? (identifying key stakeholders needed to support the plan, setting out detailed plans for the early phases on engagement.)

Please note that a word limit of 2,000 words applies to Delivery Plans.

Please note that if a Bidder:

- i) Makes quantitative proposals but does not provide any evidence (i.e. by completing Evidence/Description boxes on the Social Value Calculator or through completion of a delivery plan) about how those proposals will be delivered OR;
- ii) provides evidence (i.e. by completing Evidence/Description boxes on the Social Value Calculator or through completion of a delivery plan) about social value proposals but does not make any actual quantitative proposals then
- iii) Does not submit a social value response via the Social Value Portal the Council reserves the right to treat both the bidder's quantitative and qualitative social value scores as non-compliant and be scored 0.

Measures with no Proxy Value i.e. (£0.00)

Bidders should note that any measures in the TOMs Calculator that do not have a proxy value are for recording purposes only and will not contribute to the quantitative or qualitative evaluation of this tender. These measures are included in the tender as the Council may request the successful bidder to report on progress against these measures during the contract term.

3. Evaluation of Social Value Offers made by Bidders

Social Value has been allocated a total weight of **XX%** as part of the overall quality/price matrix for this procurement, which will be evaluated using sub-weightings on the following basis:

| | Social Value Sub-Weighting |
|--------------------------------------------------------------------------------------------------------|-----------------------------------|
| Social Value Quantitative offer | 50% |
| Social Value Qualitative offer Evidence of Delivery plus a Delivery Plan (for contracts over £250K) | 50% |
| Total Social Value | 100% |

A. Quantitative Assessment:

The quantitative score will be calculated using the formula below.

The bidder submitting the highest Social Value offer will be scored 50% for this section, subject to satisfactory evidence being provided. All other bidders will be scored in relation to the highest Social Value offer as follows: -

$$\frac{\text{Bidder's total Social Value offer}}{\text{Value of the highest Social Value offer from all bidders}} \times 50$$

Worked Example: Sub-criteria A: If the Quantitative sub-weighting is 5%

If Tenderer X's social value quantitative offer was the highest at £100,000. They would receive the maximum 5% available.

Tenderer Y whose social value quantitative offer was second highest at £80,000 would score 4% (80K/100K x 5%)

Tenderer Z whose social value quantitative offer was third highest at £40,000 would score 2% (40/100 x 5)

B Qualitative Assessment:

The evidence and, as appropriate, the Delivery Plan information provided about how Social Value offers made will be delivered (Qualitative evidence) will be evaluated using the scoring mechanism set out in Table A below. The assessment will be based on an overall assurance of all the evidence provided as to the Bidder's capabilities to deliver social value offers made.

Table A Qualitative Evaluation Scoring Methodology

| Responses to the Social Value qualitative section will be evaluated using the following scoring profile: | |
|----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Score | Classification |
| 5 | Excellent - Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirements and provides comprehensive and clear details of how social value offers made will be delivered. The response provides a high level of certainty that the bidder will deliver their social value commitments. |
| 4 | Good - Response is relevant and good. The response addresses all requirements and is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled but includes some ambiguity or minor inconsistencies as to how social value offers made will be delivered. The response provides confidence that the bidder will deliver their social value commitments. |
| 3 | Satisfactory - Response is relevant and fair. The response addresses all requirements and demonstrates a fair understanding of the requirements but lacks details on how certain social value offers made will be delivered or contains some inconsistencies. Alternatively, the response fails to address all of the requirements. The response provides some concerns that the bidder will deliver the social value commitment. |
| 2 | Poor - Response is partially relevant but generally poor. The response addresses all requirements but contains insufficient/limited detail or explanation to demonstrate how the requirements (or any of them) will be fulfilled or contains major inconsistencies. Alternatively, the response fails to address the majority of the requirements. The response provides significant reservations that the bidder will deliver the social value commitment. |
| 1 | Unacceptable - No response submitted, or response fails entirely to demonstrate an ability to meet any of the requirements. |

Clarification of Social Value offers

During evaluation of bids received, if there is any apparent inconsistency between a bidder’s Social Value offer and the parameters stated above and in Appendix A Dos and Don’ts’, for bidders, or if the evaluation identifies a manifest inconsistency with the bidder’s qualitative Social Value proposals or the nature and scope of the proposed contract, South Gloucestershire Council may seek clarification to enable the bidder to explain/justify the methodology used and correct their bid if necessary.

4. Total Social Value Score

Bidders will be marked on a combination of their quantitative and qualitative responses. In committing to certain targets, bidders must provide a realistic and convincing description of how these will be achieved in practice. Example - if a bidder commits to employing 10 long-term unemployed people, it should explain the partnerships in place as well as explaining how the bidder plans to identify those potential employees.

The total Social Value score will be derived from the following calculation: -

Total Social Value Score = (Quantitative score (%) + Qualitative score (%))

5. Remedies

There may be genuine, justifiable reasons for the non-delivery of a Social Value offer from the winning contractor. In these circumstances South Gloucestershire Council will work with the winning contractor to determine what social value, to an equivalent Social Value proxy value, the contractor will deliver instead.

6. Social Value Management Fee

There is no charge for Tenderers to access the Social Value Portal for the purpose of responding to this tender. However, for the successful Tenderer who is subsequently awarded the contract, there is a % charge of the total value for the initial contract term (not including extensions), with a minimum fee of £500 or £750 per annum and capped at a maximum possible fee of £5,000 or £7,500 per annum. The fee is paid annually in advance of each year of the contract.

For projects evaluated by the Council and contract managed by Social Value Portal:

| Total Contract Value (excl extension) | £250k - £3.35M | >£3.35M |
|---------------------------------------|----------------|---------|
| Annual Fees | 0.15% | £5,000 |

For Projects evaluated and contract managed by Social Value Portal:

| Total Contract Value (excl extension) | £250k - £3.35M | | >£3.35M | |
|---------------------------------------|----------------|---------|---------|---------|
| | Year 1 | Year 2+ | Year 1 | Year 2+ |
| Annual Fees | 0.2% | 0.15% | £7,500 | £5,000 |

The successful bidder will be required to contract directly with the Social Value Portal who will provide the following services to the supplier

- Online account with Social Value Portal to allow contract management and project reporting account
- Technical support with data entry (e.g. access and functionality issues)
- Confirmation of evidence required to satisfy requirements
- Quarterly reports showing progress against targets
- End of project summary report and case study

The successful supplier will be invoiced directly by The Social Value Portal (SVP) upon award and will be responsible under the terms of the contract for payment directly to SVP.

Worked examples: Based on (0.2%)

Example A:

The total contract value is £800,000 for a project/contract duration of 2 years:

The successful contractor would be required to pay the SVP £3,200

$£800,000 \times 0.2\% = £1,600$ per annum,

$£1,600 \times 2$ years = £3,200

Example B:

The total contract value is £5,000,000 for a project/contract duration of 2 years:

The successful contractor would be required to pay the SVP £15,000:

$£5,000,000 \times 0.2\% = £10,000$ but the fee is capped at £7,500 per annum,

$£7,500 \times 2$ years = £15,000