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## Social Value Portal - Dos and Don'ts for Bidders

**Bidders:** You must read these instructions before submitting your Social Value offer. Please ensure that your social value offers are made in relation to this contract only and do not take into account other social value initiatives being delivered elsewhere by your organisation.

### Useful terms

FTE: Full time equivalent

LTU: Long Term Unemployed person

MSMEs: Micro Small and Medium Enterprise;

NEETs: Not in Education, Employment or Training (applies for young people)

VCSEs: Voluntary Community and Social Enterprise;

### **NB:**

Bidders are encouraged to raise a clarification question through the Council's Tendering Portal if they are unsure of any detail in this process. This will allow the South Gloucestershire Council the opportunity to clarify the requirements to all participating suppliers and help to avoid lengthy communications after tenders have been returned.

### How to submit a good Social Value offer on the Social Value Portal

#### DO Only report activities/offer social value that will be delivered as a result of this contract

Ensure that your Social Value targets are relevant and proportional to this contract only and are not based on any other projects, initiatives, or wider Corporate Social Responsibility.

Example: If you organise a mental health and wellbeing session at your head office, you cannot claim social value for this on a contract as it has not been delivered specifically for the contract you are bidding for.

At times, you may need to consider **attribution**. Ensure you assess what proportion of the overall investment you are directly responsible for. For example, cases where:

- An investment has been made in partnership with other organisations
- Social value initiatives are spread across several projects and so can only partially be linked to this contract

Example: An organisation has invested £1,500 to organise a Careers fair in a certain geographical area. However, the contribution can only be partially linked to the project/contract for which social value is being reported, because it has 3 projects in the same geographical area. In this case, enter £500 for the relevant project.

### DO NOT Offer anything that is already required as part of the core contract

Services or works that the bidder is required to provide as part of the core contract requirements cannot also be counted as additional social value.

Example: If the contract is about supporting people back to work, you cannot claim social value for getting people back to work as that is part of the requirement of the core contract

- *Social value is about 'additionality', i.e. what will you provide over and above the core contract*

### DO Avoid 'Double Counting'

It is important that bidders only claim Social Value once.

#### Examples:

- If a reduction in CO<sub>2</sub> emissions is proposed through implementing a flexible working initiative, bidders may not claim the same reduction in emissions achieved through a different initiative (Ref. TOMs: NT32 & NT33)
- If local spend targets are entered under 'Spend in the local supply chain', that same value cannot also be claimed under 'Spend with local MSMEs' and vice versa, even if the recipient is a local MSME (Ref. TOMs: NT18, NT18a & NT19)
- If hours volunteering in the local community are claimed, these same hours cannot also be claimed under hours volunteering to improve green infrastructure (Ref. TOMs: NT29)

As a rule of thumb, always ensure you **must not double-count the same initiative**. There are however **two exceptions** to this rule:

#### 1. Disadvantaged people into work & local people into work

An individual can be both local (NT1) and from a disadvantaged background (NT3/NT4/NT5/NT6). As these measures capture different types of value; NT1 captures the Local Economic Value of local employment and NT3/NT4/NT5/NT6 capture the Social Value generated by employing a disadvantaged person. In these instances, you may count the same individual in both measures (e.g. local and disabled). However, the disadvantaged background measures cannot be double-counted with one-another, so if an individual corresponds to two disadvantaged categories (e.g. an individual being disabled and also an ex-offender), only count them in one of the measures.

Additionally, where local employees (NT1) can be counted for every year that they work on the contract, please note that disadvantaged people can only be counted for their first year of employment.

#### 2. Local and MSME spend & VCSE spend

If you spend money with a local VCSE (NT14), you can input the amount in both NT14 and NT18 (Local spend) OR NT19 (Local MSME spend). Once again, this is because they represent two different types of value, NT14 captures the additional Social Value generated by spending with a VCSEs (NT14) and NT18/NT19 capture the Local Economic Value delivered by spending locally.

Example 1: You spend £1,000 with a small local VCSE and £2,000 with a local MSME.

NT14 (VCSE spend) = £1,000 (Social Value)

NT18 (Local spend) = £0

NT19 (Local MSME spend) =£1,000 + £2,000 = £3,000 (Local Economic Value)

Scenario 1: You spend £1,000 with a small VCSE and £4,000 with a local company (not an MSME).

NT14 (VCSE spend) = £1,000 (social value)

NT18 (Local spend) = £4,000 (local economy value)

NT19 (MSME spend) = £0

**DO Account for employment accurately** – all employment measures in the TOMs use the same unit: No. People FTE

*'FTE' = Full Time Equivalent, per year*

Bidders should only include the actual time spent on the contract by their employees. This should be calculated as a 'Full Time Equivalent' (FTE). For example, a project lasting six months and employing only one person has an FTE equal to '0.5'. Similarly, where an employee only spends 3 months delivering an aspect of a 12-month contract, their contribution should be measured as '0.25 FTE'

Calculating time spent on a project in 'FTE':

- Full time for 1 year      1
- 6 Months                    0.5
- 3 Months                    0.25
- 1 Months                    0.083
- 1 Week                      0.0192

*Accounting for people in employment, accurately:*

Number of employees	Number to input on the portal (for the total length of the contract)	Why?
NT1 - No. of local direct employees (FTE) hired or retained (for re-tendered contracts) on contract	<b>3</b> <i>E.g. for 1 local person (FTE) employed during a 3-year contract, please input 3 on the portal</i>	Local people will remain local throughout the contract and the proxy value reflects the local economic benefits of employment. Hence, you should input your number of local employees for every year of the contract.  Please note that your target for this measure should only include direct employees and any supply chain employees should be entered into NT1c

NT3 - No. of employees (FTE) taken on who are long-term unemployed	1  <i>E.g. for 1 long-term unemployed person employed during a 3-year contract, please input 1 on the portal</i>	Long-term unemployed people, taken on as a result of the contract who have previously been claiming Jobseeker's Allowance (JSA) benefits for at least 12 months preceding the start of their employment contract. After 1 year they are no longer unemployed
NT4 - No. employees (FTE) taken on who are 'NEETs' (Not in Employment, Education or Training) as a result of a recruitment programme	1  <i>E.g. for 1 NEET employed during a 3-year contract, please input 1 on the portal</i>	Young (16-24 y.o.), long-term unemployed people, taken on as a result of the contract, had previously been Not in Employment, Education, or Training (NEET) <u>before</u> the start of their employment contract. They should therefore be accounted <u>only</u> for the year in which they move into employment.
NT5a - No. employees (FTE) taken on who are rehabilitating young offenders (18-24 y.o.) as a result of a recruitment programme	1  <i>E.g. for 1 rehabilitating young offender employed during a 3-year contract, please input 1 on the portal</i>	Rehabilitating young offenders, taken on as a result of the contract, were within their rehabilitation period before the start of their employment contract.  They should therefore only be accounted for during the year in which they move into employment.
NT6 - No. of jobs (FTE) created for people with disabilities as a result of a recruitment programme	1  <i>E.g. for 1 disabled person employed during a 3-year contract, please input 1 on the portal</i>	An employee with disabilities is defined as having a physical or mental impairment that has a 'substantial and long-term effect on their ability to do normal daily activities'.  The proxy value reflects the opportunity for them to get into employment, they should therefore only be accounted for during the year in which they move into employment.

### DO Account for employment accurately – Disadvantaged Measures

Here are a few rules to remember when making use of the disadvantaged people into work measures.

- As set out above, you may record in the same employee through both local employment measures (NT1) and disadvantaged employment measures.
- You may only count a disadvantaged person into work for the first year of employment with your organisation. This is because after being employed for 12-months, the proxy value for these measures no longer applies, as it reflects the value to the individual of entering the labour market.
- These measures are intended to be used as part of recruitment programmes with relevant VCSEs/organisations. You may only claim the value of disadvantaged employment that you have created through specific and intentional initiatives. As such, to evidence these measures, you will require evidence the a recruitment programme you have implemented which led to employment of the disadvantaged individual.

Consider the below example where an individual has been hired by a supplier, on a full-time basis, for a 3-year project.

Example: They have been employed through Bounce Back (a VCSE organisation that supports ex-offenders back into work), and also happen to be local to the project.

This should be recorded through the Social Value Calculator as follows:

NT1(Local direct employees): 3 FTE (because it is a 3-year project and you can account for local employment every reoccurring year of the contract)

NT5 (ex-offenders): 1 FTE (because you may only count disadvantaged measures for the first year of employment)

Scenario B:

An individual has been employed through the supplier's relationship with the local authority. They are local to the site and have been recruited via a charity that supports long-term unemployed people into work, they also happen to be disabled.

This should be recorded through the Social Value Calculator as follows:

NT1 (local direct employees): 3 FTE

NT3 (long-term unemployed): 1 FTE

NT6 (disabled people): 0 FTE (As well as constituting double-counting, the supplier has not used a recruitment programme that aims to support disabled people into work and so cannot claim the Social Value generated here)

### DO Make sure that you deliver locally

The definition of 'Local' has been set up as being within a specific boundary set by the local authority.

- Any Social Value offer that does not provide benefits to the communities within this definition will be excluded in the evaluation. Equally, bidders must not include elements of spend in their proposals which are expected to occur outside of this definition (e.g. central overheads or head office costs where the bidder's head office is outside the defined local area).
- In estimating the level of local spend, bidders must only include projections of spend that occur as a result of this contract and can be influenced by their own spending decisions. Bidders must not include estimates of local spend within their supply chain which are outside of their direct control.

### DO Make sure that you only include committed local spend in your supply chain

In committing to spending locally, bidders must only include spend that will result from being awarded this contract and can be influenced by their own spending decisions. Remember that your social value offer will be contractualised, therefore any offer to include local companies in your supply chain must not include any local spend which is outside of your direct control.

### DO Make sure your read and understand the units

Examples:

- NT7 and NT11 (amongst others): *no. hrs (total session duration) \*no. attendees* (not just number of hours and does not include preparation time).

- NT9, NT9a and NT10, NT10a, (amongst others): *no. of weeks* (not no. of people)
- NT31: *tonnes of CO<sub>2</sub>*
- NT32: *miles saved*
- NT33: *miles driven*

**DO Provide good descriptions and any relevant evidence of how you will deliver your social value offers**

When making your social value offers you should include a description of how you intend to deliver this and any relevant evidence to support your target on the Portal. You should refer to the measure's Target Guidance on the Portal for what information should be provided.

**Example 1:** A bidder sets a social value target to deliver some schools talks. (NT8)

**Descriptions & Evidence expected:** Names of schools identified in the local area, a potential contact for each school, what the school talks would be about, confirmation from the school(s) that the talks would be welcome, who within the team would deliver each talk and details of relevant experience to deliver the talks.

**Example 2:** Example 2: A bidder sets a social value target to procure products/services through a local company (NT18/NT19)

**Evidence expected:** Evidence that work has been undertaken to identify local companies that can provide services required to support main delivery and that those companies have been contacted and are willing to supply to the main contractor. Evidence should include names and post codes of companies concerned together with the sums to be spent.

**You will be required to provide evidence for each target you deliver against during contract management** e.g. HR reports, employment records, emails detailing the organisation of an event with contributing organisation, etc.

**DO Enter your social value offer for the length of the contract onto the portal, but do not forget to provide a breakdown per year**

You should enter the total number of units delivered for the whole length of the contract and provide a breakdown in the comments box (i.e. include the total target for the length of the contract, target per year and a breakdown per activity if applicable).

**Example:** You are offering to deliver 28 hours of volunteering per year for a 3-year contract. Please enter '84' on the portal and add the breakdown in the comments box on the right (i.e. 28 hours of volunteering per year = 84 hours for the length of the contract)