



Invitation to Tender

Social Value

Wording

****2021 Release****

Notes for customer:

The following is provided to assist customers with draft wording to set out their approach and evaluation methodology for seeking Social Value in tender documentation. It will be for customers to determine which elements they wish to include/exclude. Items highlighted in yellow are key points for customers to consider the approach they wish to take.

Evaluation of Social Value Requirement – Information for Bidders

1. Introduction

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.**

2. Social Value Evaluation Overview

Lancaster City Council is committed to a performance and evidence-based approach to Social Value. Based on the National TOMs (Themes, Outcomes and Measures) developed by the Social Value Portal, bidders are required to propose credible targets against which performance (for the successful bidder) will be monitored. The TOMs within this tender process have been developed to reflect the specific needs of Lancaster City Council and bidders will be given access to them after registering on the Social Value Portal. Please see the link below which explains how the SVP measure social value: <https://www.youtube.com/watch?v=SGo7gMitCDQ>

Please note that Lancaster City Council is not being prescriptive as to which TOMs measures are being sought from bidders by way of Social Value proposals. Bidders are free to choose those measures that are proportional and relevant to their business and this specific contract. However, a key success factor for bidders will be to demonstrate the ability to deliver against the commitments made.

3. Social Value Bid Submissions

Overall Approach

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.

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 Lancaster City Council will contractualise these commitments with the winning bidder which will then be monitored and reported on periodically.

Lancaster City 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 below to register on the Portal.

Bidder registration link:

<https://app.socialvalueportal.com/s/supplierregistration?svpprojectid=SI0-0000-01DTR>

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 Chest delivered by Proactis, 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.

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

Bid Requirements

Bidders are required to complete the following as part of their tender:

- A A quantified Social Value Proposal (see '**Quantitative Social Value Proposal**'); and
- B Evidence describing how the social value being offered will be delivered against each of the measures offered (see '**Qualitative Social Value Proposal**').

Quantitative Social Value Proposal

Bidders will be provided with online access to the set of TOMs that Lancaster City 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 this includes, but is not limited to:

- Employment Measures: Full Time Equivalents (FTE)
- Supporting people into work and Staff Wellbeing: No. hrs * attendees
- Apprenticeship and Training Opportunities: no. weeks
- Community initiatives and Innovation measures: £ invested including staff time

The Unit Toolkit is available through the Social Value Calculator: <https://socialvalueportal--c.um5.visual.force.com/apex/unittoolkit>

'Dos' and 'Don'ts'

Bidders are to make sure that they follow the guidance set out in **Appendix A** which sets out a number of Dos and Don'ts that will apply to Social Value quantitative offers made by bidders. It is essential that you read this guidance before submitting a Social Value offer.

Local Jobs (NT1):

Bidders should record new and existing local jobs that are created or sustained directly as a result of this contract only

Contract Value

As part of their submission, bidders are required to input an estimate of the contract value for the full initial contract period, on the Portal. This will not be evaluated as part of the social value element of

the tender but provides a useful sense check for bidders and the Authority as to whether social value proposals are proportionate to the contract. The figure entered must be consistent with the bidder's priced proposal and with the Authority's instructions regarding the scope of the contract, including its duration.

Proportionality

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).

Local

Please note that Local Economic Value commitments such as local employment (NT1/NT1c) and local spend (NT18/NT19) should be appropriate to the local area. For Lancaster City Council, 'local' is defined as being within the Lancaster City Council area.

Where bidders are unable to deliver a Social Value commitments (measures that do not reference local within the measure) within this definition of local, it can be delivered outside of Lancaster, but the Council would prefer that Social Value commitments are delivered locally.

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:

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.

- 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
- For projects that extend beyond 18 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.)

- How will you engage with local Voluntary Community and Social Enterprise (VCSE) organisations in the delivery of your offer? (if applicable)
- 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

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

Please note that if a Bidder either:

- 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

Both the bidder's quantitative and qualitative social value scores may be treated as non-compliant and be scored 0.

Minimum delivery

As a minimum (Name Council/organisation) expects that (x%) of the successful contractor's total social value commitment be delivered within each (month / quarter/ year) of the contract.

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.

4. Evaluation of Social Value Offers made by Bidders

Social Value has been allocated a total weight of 10% 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	5%
Social Value Qualitative offer Evidence of Delivery plus a Delivery Plan (for contracts over £250K	5%
Total Social Value	10%

A. Quantitative Assessment:

The quantitative score will be calculated using the formula below.

The bidder submitting the highest Social Value offer will be scored 5% 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: -

$$\frac{\text{Bidder's total Social Value offer}}{\text{Value of the highest Social Value offer from all bidders}} \times 5\%$$

Worked Example:

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)

Bidders are to note that the information submitted by bidders in the Description/Evidence Box and Delivery Plan 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.

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
100%	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.
75%	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.

50%	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.
25%	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.
0%	Unacceptable - No response submitted, or response fails entirely to demonstrate an ability to meet any of the requirements.

i) 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, Lancaster City Council may seek clarification to enable the bidder to explain/justify the methodology used and correct their bid if necessary.

5. 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 (%))

6. Remedies

There may be genuine, justifiable reasons for the non-delivery of a Social Value offer from the winning contractor. In these circumstances Lancaster City Council will work with the winning contractor to determine what social value, to an equivalent Social Value proxy value, the contractor will deliver instead. Where this is not possible, the Council may seek to apply Liquidated Damages.

Appendix A [Appendix A to be amended as appropriate accordingly to TOMs used by [Council/authority]]

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 Lancaster City 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 (RE14) 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 CO₂ 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 or NT19a)
- 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 & NT34)

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	3 <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 you 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, NT10b (amongst others): *no. of weeks* (not no. of people)
- NT31: *tonnes of CO₂*
- 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)

For SVP use only

SV in Procurements Customer Options Checklist

<u>Ref</u>	<u>Issue</u>	<u>Customer adopting/not adopting? If adopting set out methodology to be used</u>
Page 6 Inclusion of contract value	Does customer wish for bidders to set out their contract values on the Portal?	
Page 6 Local jobs	Council/authority to confirm approach to local jobs with/without TUPE	
Page 7 Local area (also see page 7)	If council/authority wants SV to be delivered locally, what is definition of local area?	
Page 7 Delivery Plans (also see pages 8 and 9)	If delivery plans are to be used, what is the estimated contract value at which will these be applied?	
Page 8 No evidence or SV commitment provided by bidder	Will customer be adopting this wording?	
Page 9 Prioritisation of measures	Has the customer decided to prioritise any measures? Identify which ones	
Page 9 Evaluation of Social Value in tenders	What is the SV% agreed for tenders? What is the sub-weighting split for quantitative and qualitative (and delivery plan if used)?	
Page 10 Qualitative evaluation methodology	What qualitative evaluation methodology will the customer be using? Please ensure a copy is provided	
Page 11 Minimum thresholds	Will customer be adopting this wording?	
Page 11 Remedies	Will the customer be applying remedies in contracts – if so what will their approach be? Please ensure a copy of the wording to be used is provided	
Appendix A	Have you aligned Appendix A to the customers TOMs framework?	