

Evaluation of Social Value Requirement - TOMs

Information for Bidders

1. Introduction

This Section sets out the methodology that Islington Council will follow to evaluate Social Value offers from bidders as part of this procurement.

2. Social Value Evaluation Overview

Islington 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 will be 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 Islington 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 Islington Council is not being prescriptive as to which TOMs measures are being sought from bidders by way of Social Value proposals (other than for any mandatory measures that may be set out in the Bid Requirements section). 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. 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 Islington Council will contractualise these commitments with the winning bidder which will then be monitored and reported on periodically.

Islington 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 will have to be made via the Social Value Portal. The Invitation to Tender (ITT) will include a unique link, allowing bidders to register and access information specific to this contract.

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.

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

Bid Requirements

There may be social value measures that are a mandatory requirement for this tender, and all bidders will have to submit a commitment against these measures. Please note bidders are free to select any additional measures from the TOMs calculator that are within their capacity and capability to deliver.

Bidders will be 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 the online access to the set of TOMs that Islington 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 will have access to the Unit Toolkit on the Portal, and 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

Proportionality

None of the measures are mandatory (unless stated in the Bid Requirement section as "Mandatory Social Value Measures") 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 social value commitments should be appropriate to the local area. For Islington Council, 'local' is defined as being within the London Borough of Islington.

Qualitative Social Value Proposal

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

The Qualitative Social Value Proposal will consist of the following:

- 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 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.

Prioritisation of measures:

'Please note that a commitment made against the TOMs measures listed in the ITT may be valued at (x2 or x3) the regular proxy value to recognise key priorities for the service area. The prioritisation factor for these measures will be set out in the Portal and will be visible to bidders. Please be advised that these prioritisation factors will only be taken into account at the evaluation stage.

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 20% 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	10 %
Social Value Qualitative offer Evidence of Delivery plus a Delivery Plan	10%
Total Social Value	20%

A. Quantitative Assessment:

The quantitative score will be calculated using the formula below.

The bidder submitting the highest Social Value offer will be scored (10 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: -

$$\frac{\text{Bidder's total Social Value offer}}{\text{Value of the highest Social Value offer from all bidders}} \times 10 .$$

Worked Example: Sub-criteria A: If the Quantitative sub-weighting is 10%

If Tenderer X's social value quantitative offer was the highest at £100,000. They would receive the maximum 10% available.

Tenderer Y whose social value quantitative offer was second highest at £80,000 would score 8% (80K/100K x 10%)

Tenderer Z whose social value quantitative offer was third highest at £40,000 would score 4% (40/100 x 10%)

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% (5 points)	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% (4 points)	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% (3 points)	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% (2 points)	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% (1 point)	Unacceptable - No response submitted, or response fails entirely to demonstrate an ability to meet any of the requirements.

Minimum thresholds

Bidders are to note that where a bidder's qualitative SV offer is below 50% (3 points), the Council reserves the right to reject the Social Value offer.

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, 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, Islington 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 Islington Council will work with the winning contractor to determine what social value, to an equivalent Social Value proxy value, the contractor will deliver instead.