

Part 6 Social Value Requirement Information for Applicants

Contract Reference

TCCS7824

Contract Title

**Funeral Director's work in connection
with National Assistance Act Funeral
(Burials and Cremations) within the
Torbay boundary 2024**

Contents

- A Introduction..... 3
- B Social Value Evaluation Overview 3
- C Social Value Bid Submissions 3
- B1 Overall Approach..... 3
- B2 Bid Requirements 4
- B3 Quantitative Social Value Proposal..... 5
- B4 Qualitative Social Value Proposal..... 6
- B5 Incomplete Submissions..... 6
- B6 Delivery Timeline 7
- C7 Not Used 7
- B8 Not Used 7
- C Evaluation of Social Value Offers made by Applicants..... 7
- C1 Weightings..... 7
- C2 Not Used 7
- C3 Qualitative Assessment: 7
- C4 Clarification of Social Value Offers..... 10
- C5 Total Social Value Score 10

A Introduction

This document sets out the methodology the Council will follow to evaluate Social Value submissions from Applicants as part of this procurement.

Please Note: Applicant's MUST read the "Do's and Don'ts" for Social Value Bids set out at Appendix G before submitting their Social Value Offer.

B Social Value Evaluation Overview

The Council is committed to a performance and evidence-based approach to Social Value. Based on a local version of the National TOMs (Themes, Outcomes and Measures) Framework developed by the Social Value Portal, Applicants are required to propose credible targets against which performance (for the successful Applicant) will be monitored. The TOMs within this tender process have been developed to reflect the specific needs of Torbay Council and Applicants will be given access to them as part of the tender pack documentation.

Please Note: The Council is not prescriptive as to which TOMs measures applicants can select to set targets as part of their Social Value proposals. Applicants are free to choose those measures that they consider appropriate. However, a key success factor for Applicants will be to demonstrate their ability to deliver against the targets selected, which should be proportional and relevant to their business and this specific Contract. Applicants should note that targets will be treated as contractual commitments if the Applicant is successful.

B1 Overall Approach

- B1.1 Applicants are free to make a commitment against any measure described within the Torbay TOMs matrix. Applicants are not required to submit a Social Value offer against each measure, only those that Applicants consider their organisation is best placed to offer given the nature and value of the contract.
- B1.2 There are a number of local organisations that are willing to work with successful contractors to deliver social value commitments. If you would like signposting to local organisations relevant to the area of Social Value you want to deliver, please submit your request through the messaging facility on the Supplying the South West e-Tendering Portal for more information.
- B1.3 **Please Note:** Applicants should be aware of the following:
- a) Applicants' social value proposals should relate to what will be delivered directly as a result of this Contract only and which will directly benefit Torbay and its residents. Social value or corporate social responsibility initiatives being delivered as business as usual and/or outside of this Contract must not be included in an Applicants' social value proposal.
 - b) The core requirements of the Contract cannot be included within social value targets – social value targets must go above and beyond what a
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supplier is contracted and paid to deliver.

- c) Care must be taken by Applicants to ensure the target levels they set align with the duration of the contract. Some target units are annualised (notably Full-Time Equivalents or FTEs), so for these measures contract durations of less than one year will require a fraction of a full FTE, while contract durations of longer than one year will require a multiple of a full FTE. Please check the guidance for further information.
- d) Targets must be provided for the initial term of the Contract only – i.e., not including any potential extension periods. For example, if the Contract you are bidding for has an initial term of 2-years with a potential extension of period of a further year (2+1), you should set your targets against the initial 2-year duration.
- e) It is important that Applicants are genuine and confident in their ability to deliver social value proposals made, as the Council will contractualise these commitments with the winning Applicant which will then be monitored and reported on periodically.
- f) The Applicant's ability to deliver its social value targets will be evaluated as part of the submission, based on the supporting evidence provided by the Applicant. Where evidence provided is deemed to be inadequate, targets set by Applicants may be discounted.
- g) Unless specified in the measure text or supporting guidance, targets should only relate to the social value that will be delivered directly by the Applicant. In other words, social value delivery unlocked through wider supply chains should not be included unless this is explicitly permitted. This is in order to ensure a level playing field and reflects the likelihood that at the bid stage supply chains may not be fully contractualised.

B1.4 The 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 successful Applicant to work openly and transparently with the Council whilst bearing in mind that the overall value of Social Value commitments made must be delivered by the successful Applicant.

B2 Bid Requirements

B2.1 Applicants are required to complete the following as part of their tender:

- a) Evidence describing the Applicant's overall approach to social value delivery for the contract and an explanation of how the social value being offered will be delivered against each of the measures offered (see '**Qualitative Social Value Proposal**').

B3 Quantitative Social Value Proposal

- B3.1 Applicants will be provided with access to the set of TOMs that Torbay Council has developed for this project in the tender documentation.
- B3.2 Applicants are required to complete and submit their responses through Part 8b (Social Value Calculator) in line with the guidance provided and the deadline for tender submissions.
- B3.3 Applicants are not required to submit proxy economic values as part of their response. Consequently, there is no quantitative assessment of social value as part of this tender. However, Applicants are encouraged to include quantitative measures using the appropriate unit(s) suggested, as these will be considered within the overall qualitative evaluation of the response and contractualised if the Applicant is successful. Applicants therefore should adhere to the guidance in the remainder of this section when including quantitative measures.
- B3.4 'Dos' and 'Don'ts'
- Applicants are to make sure that they follow the guidance set out in Appendix G which sets out a number of Dos and Don'ts that will apply to Social Value quantitative offers made by Applicants. It is essential that you read this guidance before submitting a Social Value offer.
- B3.5 TUPE
- Applicants must take care to ensure that the targets they set for local jobs are consistent with the Council's requirements and calculated correctly based on Full-Time Equivalent (FTEs). In addition, the applicant should note the following:
- Local Jobs (NT1): Applicants should record new and existing local jobs that are created or sustained directly as a result of this contract only
- Applicants may include new local jobs that are created as a result of being awarded this contract. These new local jobs must be entered against NT1/NT1b, as appropriate (see 'Sub-localities' in s.3.9).
- B3.6 Contract Value
- As part of their submission, Applicants are advised to input an estimate of the contract value for the full initial contract period, in their response to Part 8b Social Value Calculator (Cell D4). This will not be evaluated as part of the social value element of the tender but provides a useful sense check for Applicants and the Council as to whether social value proposals are proportionate to the contract. The figure entered must be consistent with the Applicant's proposal and with the Council's instructions regarding the scope of the contract, including its duration.
- B3.7 Proportionality
- None of the measures are mandatory and Applicants 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).

B3.8 Local

Applicants must ensure that their proposals meet the Council's definition of 'Local'. Please read this section carefully.

All targets set by applicants in the Social Value Calculator should be deliverable in the local area as defined by the Council. 'Local' is defined as being within the Torbay Council area. Please see below list of applicable postcode areas:

TQ1 1	TQ1 2	TQ1 3	TQ1 4	TQ1 9	TQ12 4	TQ2 5
TQ2 6	TQ2 7	TQ2 8	TQ3 1	TQ3 2	TQ3 3	TQ4 5
TQ4 6	TQ4 7	TQ4 9	TQ5 0	TQ5 5	TQ5 8	TQ5 9

Sub-Localities (NT1b/NT18a)

Please note that there are certain measures, such as NT1b and NT18a, used in the Social Value Calculator that make reference to 'sub-localities' and refer to ListNT1b or List18a, this means that all targets included against these measures must be delivered within the postcode areas ('sub-localities') outlined in Appendix I.

B4 Qualitative Social Value Proposal

- B4.1 Applicants are to provide evidence against each Social Value commitment to explain how each commitment will be delivered.
- B4.2 The Qualitative Social Value Proposal will consist of the following:

Delivery Plan/Method Statement

Applicants are required to select which measures they are making commitments for in Part 8b Social Value Calculator (Column I) and provide a rationale for each Social Value proposal in their consolidated response through their Delivery Plan/Method Statement response (Cell L15), 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 Applicant or through its supply chain.

Please Note: the method statement field in Part 8b Social Value Calculator has a limit of [2000] characters however Applicants can attach additional supporting information if required.

B5 Incomplete Submissions

Please Note: that if an Applicant either:

- a) Makes quantitative proposals (by setting targets in the Social Value Calculator) but fails to provide any supporting evidence in the relevant Evidence/Description boxes on the Social Value Calculator (or through relevant descriptions in a completed Delivery Plan) about how these proposals will be delivered

OR

- b) Makes a qualitative submission (i.e. by entering information in the Evidence/Description boxes on the Social Value Calculator (or through completion of a Delivery Plan) but does not make any actual quantitative proposals by setting targets in the Social Value Calculator
OR
- c) Makes a quantitative or qualitative submission based upon TOMS measures that do not feature in the Torbay TOMS Framework (Appendix H, replicated in Part 8 Social Value Calculator), then

The Council reserves the right to treat both the Applicant's quantitative and qualitative scores as non-compliant and will be scored 0 (zero).

B6 Delivery Timeline

As a minimum Torbay Council anticipate the successful contractor to be able to identify within the first six months of the contract when they anticipate being able to deliver on the Social Value commitments made.

B7 Not Used

B8 Not Used

C Evaluation of Social Value Offers made by Applicants

C1 Weightings

Social Value has been allocated a total weight of 10% as part of the overall quality/price matrix for this procurement.

C2 Not Used

C3 Qualitative Assessment:

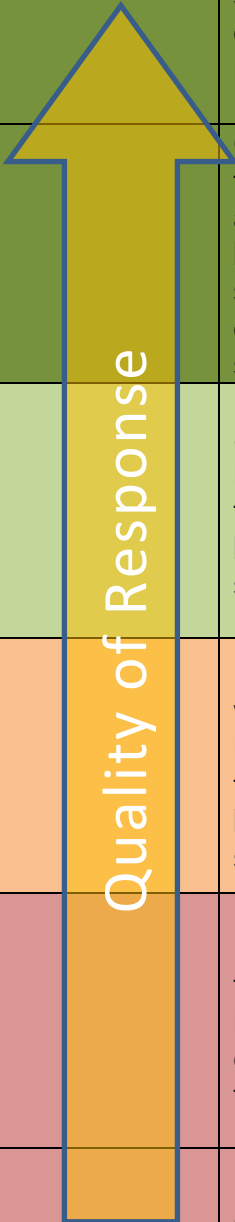
The evidence and information provided about how Social Value offers made will be delivered (Qualitative evidence) will be evaluated using the scoring mechanism set out in Table A below. The assessment will be based on an overall assurance of all the evidence

provided as to the Applicant’s capabilities to deliver social value offers made. Please note any information provided through clarifications that was not part of the original submission will not impact the qualitative scoring.

Table A: Qualitative Evaluation Scoring Methodology (example)

Responses to the Social Value qualitative section will be evaluated using the following scoring profile:

<p>Score 5 - Excellent</p>	<p>Excellent demonstration by the Applicant of how they will deliver their chosen indicators, the achievability of delivery, the community benefits realised and the ability to measure success. Response identifies factors that will offer significant added value and/or innovation, with evidence to support the response</p>
<p>Score 4</p>	<p>Good demonstration by the Applicant of how they will deliver their chosen indicators, the achievability of delivery, the community benefits realised and the ability to measure success. Response identifies factors that will offer potential added value, with evidence to support the response.</p>
<p>Score 3</p>	<p>Satisfactory demonstration by the Applicant of how they will deliver their chosen indicators, the achievability of delivery, the community benefits realised and the ability to measure success</p>
<p>Score 2</p>	<p>Demonstration by the Applicant of how they will deliver the majority of their chosen indicators, and/or limited evidence regarding the achievability of delivery, the community benefits realised and the ability to measure success.</p>
<p>Score 1</p>	<p>Poor demonstration by the Applicant of how they will deliver their chosen indicators and limited evidence regarding the achievability of delivery, the community benefits realised or the ability to measure success</p>
<p>Score 0 - Unacceptable</p>	<p>Does not comply and/or unacceptable demonstration by the Applicant of how they will deliver their chosen indicators. No evidence regarding the achievability of delivery, the community benefits realised and the ability to measure success.</p>



C4 Clarification of Social Value Offers

The Council has defined the period when Applicants can ask clarification questions which ends **before** the tender submission deadline. Applicants should refer to the procurement timetable information in the ITT pack.

You are strongly advised to ask any questions as soon as possible and well in advance of the clarification question period deadline. This should include any questions about the Social Value component.

In keeping with good practice, the Council will endeavour to evaluate social value offers based on the information provided. Applicants should not expect evaluators to seek missing information as a matter of course before determining the score.

During evaluation, the Council may, at its absolute discretion, require applicants to clarify certain aspects of their bids in writing.

Clarification may be sought if there is a material and manifest inconsistency in the quantitative or qualitative elements of an Applicant's Social Value offer. This does not apply to circumstances where Applicants have not correctly followed the guidance provided; in this case the Council reserves the right to correct or discount the relevant qualitative or quantitative element without further clarification.

It is therefore essential that Applicants seek additional guidance from Appendix G (Do's and Don'ts for Applicants) ahead of the clarification deadline.

The Council reserves the right to discount and award a score of zero if an applicant fails to respond within the time required, or to provide an adequate response to support the social value claim for a measure.

Please note that if it is required, the clarification process will be used to ensure that proposals are compliant with the TOMs methodology and is not an opportunity for applicants to increase their social value proposals and on no account should any attempt be made to negotiate.

C5 Total Social Value Score

Applicants will be marked on the total quality of their method statement response, including quantities of commitments made and evidence for how these will be delivered and evidenced in practice.