**Evaluation of Social Value Requirement – Information for Bidders**

1. **Introduction**
	1. This Section sets out the methodology that London Borough of Waltham Forest (LBWF) will follow to evaluate Social Value offers from bidders as part of this procurement.
2. **Social Value Evaluation Overview**
	1. LBWF 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.
	2. The Social Value Portal is an online tool for monitoring, measuring and managing the tendering and delivery of social value through contracts and other business related activities. The Social Value Portal has been set up to use a range of robust and transparent proxies to allow the comparison of different bids as part of the tender, and to monitor the delivery of social value commitments made.
	3. In order to submit their bids, bidders will be required to submit the social value aspect of their bid through the online Social Value Portal. In order to do this, bidders must register and request access to the tender through the Portal at <https://socialvalueportal.com/supplier-registration/>. The SVP Reference No for this tender is: SVP00765. Once access has been approved, bidders will receive log on details and be able to view and input their social value bids for the tender against the National TOMs. The TOMs within this tender process have been adapted to reflect the specific needs of the organisation. Please note, tenders that do not include a social value bid on the Social Value Portal will not be accepted.
	4. Please note that LBWF is not being prescriptive as to which TOMs measures are being sought from bidders by way of Social Value proposals and 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 the ability to deliver against the commitments you make.
3. **Social Value Bid Submissions**

*Overall Approach*

* 1. Bidders are free to make a commitment against any measure described within the TOMs matrix. Each measure has a financial value (proxy value) and these will be used to calculate the overall ‘value’ of each commitment. The aggregate projected Social Value will form the basis of the quantitative Social Value evaluation, subject to the evaluation made by the evaluators of the credibility and robustness of the proposals.

**It is important that bidders should be confident of their ability to deliver Social Value proposals made, as the Council will contractualise these commitments with the winning bidder which will then be monitored and reported on periodically.**

* 1. Measuring and reporting on Social Value is a developing field and LBWF recognises that flexibility and a collaborative approach are required. 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

*Bid Requirements*

* 1. Bidders are required to complete the following as part of their tender:
* A quantified Social Value Proposal; and
* A Method Statement
	1. In their Social Value Proposals bidders will make specific Social Value commitments, using the TOMs, for the duration of the contract.
	2. The Method Statement will accompany this Proposal and explain how the commitments will be delivered. Each of the above are explained in more detail below.

**Quantitative Social Value Proposal (70% of evaluation)**

* 1. Bidders will be provided online access to the Social Value Portal National TOMs Calculator. Bidders are required to complete and submit the Calculator in line with the deadline for tender submissions. The completed Calculator forms the basis of the quantitative element of the Social Value Proposal.
	2. Bidders must accompany input target figures for specific Social Value measures with a rationale for each Social Value proposal in the Description / Evidence Box on the form 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. Additional supporting documentation may be provided where necessary to justify the bidder’s approach.
	3. Bidders are not obliged to commit to any of the measures and should ensure that their proposals are relevant and proportional to this contract.
	4. The proposal must relate directly to the contract in question and should 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).

**Qualitative Social Value Proposal (30% of evaluation)**

Method Statement

* 1. The Method Statement should support the Social Value Proposal. The Method Statement should contain the following sections:
1. *Thematic Approach*

This section should cover the bidder’s broad approach under each Theme and explain how the bidder will make best use of the opportunities created the procurement to contribute to the delivery of sustainable Social Value outcomes.

This section should reference the bidder’s specific proposals made in the Calculator and place these and the Themes in the context of the community needs and opportunities in the relevant area.

1. *Delivery Capability*

This section should cover:

* An identified single point of responsibility for delivery of the Social Value strategy;
* Identification of quantified resource support, both internal and external, including any third-party support required;
* Processes for defining Social Value outcomes on specific projects
* Processes for monitoring, measurement and reporting Social Value outcomes
1. *Continuous Improvement Plan*

This section should include an explanation of how the bidder 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.

1. *Engagement and Collaboration Plan*

This section should explain how the bidder proposes to put in place a systematic process for engagement and collaboration with relevant stakeholders and prospective delivery partners on the delivery of Social Value, identifying key stakeholders needed to support the plan, setting out detailed plans for the early phases on engagement and drawing on previous relevant experience.

1. **Evaluation of Social Value Offers made by Bidders**
	1. 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:

**Quantitative score**: 70%

**Qualitative score**: 30%

**Quantitative assessment:**

* 1. The quantitative score will be calculated using the formula below:

The bidder submitting the highest Social Value offer will be scored 100% for this section. All other bidders be scored in relation to the highest Social Value offer as follows: -

$\frac{ Bidder^{'}s total Social Value offer}{Value of the highest Social Value offer from all bidders } ×100$.

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

*Quantitative assessment: Social Value offer parameters*

* 1. Bidders are to note that a number of parameters will apply to Social Value quantitative offers made by bidders. These are set out in the accompanying guidance ‘Submitting a Good Social Value Bid’ which sets out Dos and Don’ts for bidders.

**Qualitative assessment:**

* 1. The score for the quantitative response will be evaluated using scoring mechanism set out in Section 6 of the Invitation to Tender.

**Clarification of Social Value offers**

* 1. 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, LBWF will seek clarification to enable the bidder to explain/justify the methodology used and adjust their bid if necessary.
1. **Total Social Value Score:**
	1. 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 method statement 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 / plan to develop to identify those potential employees.
	2. The total Social Value score will be derived from the following calculation: -

Total Social Value score = (Quantitative score (at 70%) + Qualitative score (at 30%)) \* 0.1

Please note: The value is multiplied by 0.1 to adjust the score to 10%, as the total Social Value weighting has been set at that level.

1. **Social Value Management Fee**
	1. 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
	1. 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

**Please note:** The successful bidder will be charged ongoing management fees at 0.1% up to a maximum of £5,000/contract/year (N.B. the fee is based on the contract value spent per year) for access to The Social Value Portal. Fees will be invoiced directly from The Social Value Portal to the successful bidder and this payment will provide the bidder with quarterly reports and support in each Social Value submission and access to a project management dashboard. A minimum fee of £500/year/project and a maximum fee of £5000 is chargeable depending on the contract value spent per year. Further details are within the below table (N.B. There is no charge for bidders unless they win the project):

|  |  |
| --- | --- |
| Contract Value Spent per Year | SVP Fee (Annual) |
| <£500,000 | £500 |
| £1,000,000 | £1,000 |
| £1,500,000 | £1,500 |
| £2,000,000 | £2,000 |
| £2,500,000 | £2,500 |
| £3,000,000 | £3,000 |
| £3,500,000 | £3,500 |
| £4,000,000 | £4,000 |
| £4,500,000 | £4,500 |
| £5,000,000 | £5,000 |
| >£5,000,000 | £5,000 |