



Part 7 Social Value Requirement Information for Applicants

Contract Reference

TTDA1323

Contract Title

**St Cuthbert Mayne School Phase 2
Refurbishment Works**

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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: It is essential that Applicants watch the ‘Dos and Don’ts’ and ‘how to bid and use the Social Value Calculator’ videos, which represents best practice for completing a Social Value submission, before submitting their Social Value proposal. Applicants **MUST** read the “Do’s and Don’ts” for Social Value Bids set out at Appendix G before submitting their Social Value Offer.

This can be found here: <https://support.socialvalueportal.com/hc/en-gb/articles/4418109087249-dos-and-don-ts>.

And here: <https://support.socialvalueportal.com/hc/en-gb/articles/4402368311953-video-how-to-bid-and-use-the-Social-Value-Calculator>

Please note that you must have a Social Value Portal account before you will be able to access this. More information on registering on the Social Value Portal can be found in section C2 of this document.

B Social Value Evaluation Overview

The 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, Applicants are required to propose credible targets against which performance (for the successful Applicant) will be monitored. The social value measurement framework used in this tender process has been tailored to reflect the specific needs of the Council using the National TOMs, and Applicants will be able to access it after registering on the Social Value Portal.

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 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 email Torbay Council at socialvalue@torbay.gov.uk for further direction.

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 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 Accessing the Social Value Portal (SVP)

B2.1 The social value bid submission must be made via the Social Value Portal. You should use the link below to register for the tender regardless of whether you already have Social Value Portal login credentials or not.

<https://socialvalueportal.force.com/s/supplierregistration?svpprojectid=8e0-0000-2oeLW>

B2.2 Once you have completed your registration, you will receive an email to confirm that you have successfully registered for the tender. The email will include:

- A username, typically in the following format:
firstname.lastname@socialvalueportal.com
- A password link which expires within 48 hours of being sent

B2.3 **Please Note:**

- a) If there are any errors or missing pieces of information, you will not be able to register, and a system message will be displayed. For any technical assistance, please email support@socialvalueportal.com
- b) To reset your password, please use the following link: Forgot Your Password
- c) Please allow at least one working day to receive your login credentials and check the email has not been moved to your spam/junk mail folder

B2.4 Remember that completing your Social Value submission will require time and preparation, including specific quantified measures with supporting qualitative submissions as required. Your Social Value response/submission must be undertaken online via the Portal. 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 reupload.

B2.5 The deadline for making your final submission through the Portal is the same as the tender deadline. No extensions will be made to deadlines due to any Applicant being unfamiliar with the Portal or allowing insufficient time for uploading and submitting their social value documents.

B2.6 Please ensure that you click 'Confirm Submission' after completing your submission before the tender submission deadline. Please allow plenty of time before the deadline; last minute submissions risk not being accepted if there is a lag in the upload.

B2.7 Any queries/clarifications regarding the Social Value criteria or tender requirements must be directed via ProContract (www.supplyingthesouthwest.org.uk) through the message function.

B2.8 For any technical support with the Portal, please email the support@socialvalueportal.com. The Social Value Portal Support team are

available between 09:00 and 17:00, Monday to Friday. Please allow one working day for responses.

- B2.9 Once you have registered and logged into the Portal, you will also have access to the Social Value Portal Support site which includes a series of articles on using the Portal. You can access the Support site once you have registered and logged into the Portal via the 'Support' button at the bottom left hand side of the Portal.

B3 Bid Requirements

- B3.1 Applicants 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 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**').

B4 Quantitative Social Value Proposal

- B4.1 Applicants will be provided with online access to a page (the 'Social Value Calculator') on the Social Value Portal with the National TOMs that the Council is using. Applicants are required to complete and submit a response through the Social Value Calculator on the Social Value Portal, before the deadline set for tender submissions. The completed Calculator will form the basis of the quantitative element of the Social Value submission.
- B4.2 For assistance with calculating targets for certain measures Applicants should use the Unit Toolkit on the Portal which includes, but is not limited to:
- Employment Measures: Full Time Equivalent (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
- B4.3 The Unit Toolkit is available through the Social Value Calculator, once you have registered: <https://socialvalueportal--c.um5.visual.force.com/apex/unittoolkit>
- B4.4 '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.

B4.5 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 Equivalents (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

B4.6 Contract Value

As part of their submission, Applicants are advised to input an estimate of the contract value for the full initial contract period, on the SVP. 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 priced proposal and with the Council's instructions regarding the scope of the Contract, including its duration.

B4.7 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).

B4.8 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.

B5 Qualitative Social Value Proposal

B5.1 Applicants are to provide evidence against each Social Value commitment to explain how each commitment will be delivered.

B5.2 The Qualitative Social Value Proposal will consist of the following:

Description/Evidence Box

Applicants must accompany input target figures for specific Social Value measures with a rationale for each Social Value proposal in the Description/Evidence Box in the Calculator 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 description field on the Portal has a limit of 255 characters however Applicants can attach additional supporting information if required.

B6 Delivery Plan

- B6.1 The aim of the Delivery Plan is to enable evaluators to determine whether Applicants are properly resourcing, managing and are capable of delivering their Social Value offer.
- B6.2 In addition to completing the Description/Evidence boxes for the individual targets as set out in (i) above, Applicants are to also provide a Delivery Plan setting out their overall approach across all targets to deliver social value by providing the following information:
- a) 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;
 - b) Applicants should provide clear evidence that they can identify, source, deliver and report on each target they have set;
 - c) Applicants should include the timeline for delivering the social value offer;
 - d) 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?
 - e) Details of processes for engagement and collaboration with relevant local stakeholders, including Voluntary Community and Social Enterprises (VCSEs) in the delivery of Social Value, identifying key stakeholders needed to support the plan and setting out detailed plans for the early phases on engagement.

Please Note: a word limit of 2,000 applies to Delivery Plans.

B7 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, 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)

B8 . 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.

B9 Not Used

B10 Measures with no Proxy Value i.e. (£0.00)

Applicants 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 Applicant to report on progress against these measures during the contract term.

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, which will be evaluated using sub-weightings on the following basis:

Description	Social Value Sub-Weighting
Social Value Quantitative offer	3%
Social Value Qualitative offer. Evidence of Delivery plus a Delivery Plan (for contracts over £350K)	7%
Total Social Value	10%

C2 Quantitative Assessment

The quantitative score will be calculated using the formula below.

The Applicant submitting the highest Social Value offer will be scored 3% for this section, subject to satisfactory evidence being provided. All other Applicants will be scored in relation to the highest Social Value offer as follows:

$$\frac{\text{Applicant's Total Social Value Offer}}{\text{Value of the Highest Total Social Value Offer from All Applicants}} \times 3\%$$

Worked Example: Sub-criteria A: If the Quantitative sub-weighting is 3%

If Tenderer X's social value quantitative offer was the highest at £100,000. They would receive the maximum 3% available.

Tenderer Y whose social value quantitative offer was second highest at £80,000 would score 2.4% (£80K/£100K x 3%)

Tenderer Z whose social value quantitative offer was third highest at £40,000 would score 1.2% (40/100 x 3)

Please Note: the information submitted by Applicants in the Description/Evidence Box and Delivery Plan on the Calculator will be used in evaluation to verify the quantitative values submitted by Applicants and to ensure they meet the parameters set out below.

C3 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 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:

Score 5	Excellent	Exceptional 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
Score 4	Good	Above average 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.
Score 3	Acceptable	Adequate 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
Score 2	Minor Reservations	Minor reservations on how the Applicant will deliver their chosen indicators, or the achievability of delivery, the community benefits realised or the ability to measure success.
Score 1	Serious Reservations	Major reservations on how the Applicant will deliver their chosen indicators, or the achievability of delivery, the community benefits realised or the ability to measure success
Score 0	Unacceptable	Applicant has either not answered the question or has provided insufficient information to demonstrate how the Applicant will deliver their chosen indicators.

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 a 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 watch and understand the 'Dos and Don'ts' and 'how to bid and use the Social Value Calculator' videos and 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 a combination of their quantitative and qualitative responses. In committing to certain targets, Applicants must provide a realistic and convincing description of how these will be achieved in practice.

The total Social Value score will be derived from the following calculation: -

Total Social Value Score = (Quantitative score (%) + Qualitative score (%))

D Social Value Management Fee

- D1.1 There is no charge for Applicants to access the SVP for the purpose of responding to this tender. However, for the successful Tenderer who is subsequently awarded the Contract, there is a charge of 0.15% of the total contract value, with a minimum fee of £500 per annum and capped at a maximum possible fee of £5,000 per annum. The fee is paid annually in advance of each year of the Contract.
- D1.2 **Please Note:** the Council appreciates that some Applicants may not have the financial resources to meet these costs and where this is the case the Council may cover the costs. Applicants who would like the Council to cover costs for use of the SVP are required to identify this within their pricing submission. These costs will be included in the evaluation of pricing submissions.
- D1.3 The successful Applicant will be required to contract directly with the SVP who will provide the following services to the supplier:
- online account with SVP 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
- D1.4 The successful supplier will be invoiced directly by The Social Value Portal upon award and will be responsible under the terms of the Contract for payment directly to Social Value Portal.
- D1.5 Worked examples: Based on 0.15%

Example A:

The total contract value is £800,000 for a project/contract duration of 2 years:

The successful contractor would be required to pay the SVP £2,400

$$£800,000 \times 0.15\% = £1,200 \text{ per annum,}$$

$$£1,200 \times 2 \text{ years} = £2,400$$

Example B:

The total contract value is £5,000,000 for a project/contract duration of 2 years:

The successful contractor would be required to pay the SVP £10,000:

$$£5,000,000 \times 0.15\% = £7,500 \text{ but the fee is capped at } £5,000 \text{ per annum,}$$

$$£5,000 \times 2 \text{ years} = £10,000$$