

Appendix 5

Invitation to Tender: Social Value Requirement

Information for Bidders

1. Introduction

This section of the Invitation to Tender (“ITT”) document sets out the instructions for bidders to follow when completing the social value portion of the tender exercise, and the methodology that Oxfordshire County Council (“OCC” and “the Council”) will follow when evaluating Social Value bid responses as part of this procurement.

Ambition and Policy Aim

OCC’s ambition is for vibrant communities and growing businesses in a zero carbon Oxfordshire. We can advance that ambition whenever we buy goods, works or services. By looking beyond the financial cost of a contract or purchase, we can also consider how it might also improve the county’s economic, social and environmental wellbeing. These additional, tangible benefits are known as “social value”.

The aim of the OCC Social Value Policy is to enable the Council’s spending to go further by encouraging suppliers to commit to providing additional social value that will benefit local communities within Oxfordshire.

2. 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 (“SVP”), 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 the Council and bidders will be given access to them after registering on the Social Value Portal tool (“the Portal”). Please click [here](#) to watch a video that explains how SVP measure social value.

Please note that the Council is not being prescriptive as to which TOMs measures are being sought from bidders by way of Social Value proposals, although certain measures are being prioritised (see below section, ‘Prioritisation of Measures’). Bidders are free to choose those measures that are proportionate and relevant to their business and this specific contract. A key success factor for bidders will be to demonstrate the ability to deliver fully and reliably 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 every measure, only

those that Bidders consider their organisation is best placed to include in their bid response, given the nature and value of the subsequent contract.

Please note:

- i. Submitted social value bids should relate to this initial contract scope only. Social value or corporate social responsibility initiatives being delivered elsewhere must not be included in your social value bid response and must represent additionality for this particular contract scope – 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 the contract.
- ii. Core requirements of the contract scope cannot be counted as social value – i.e. if the contract scope 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 specification.
- 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 fully against their social value tender response, as the Council will contractualise these commitments with the winning bidder which will then be monitored and reported on periodically.

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, if acceptable to both parties and if the resulting delivery is commensurate in value to the original bid submitted in the tender exercise. A key requirement is the willingness of the winning supplier(s) to work openly and transparently with the Council whilst bearing in mind that the Council will expect to receive the equivalent overall social value to that originally agreed, even if e.g. the format or timeline changes.

Accessing the Social Value Portal

The social value bid submission must be made online via the Portal. Bidders should use the link or ID code below to register on the Portal.

Project Link: **(Insert Project Link provided via Proactis or by SVP)**

Project ID: **(Insert Project ID code provided via Proactis or by SVP)**

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 Portal login credentials, you will be sent an email containing your username and a link to set up your password.

Please note:

- 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
- If you do not receive a password setup email, please check your spam/junk mail folder
- 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.

Bidder Engagement

Representatives from The Social Value Portal are regularly hosting free bidder engagement sessions, to answer general questions about social value and conduct a live demonstration of the portal tool.

Please note that Sessions are open to all Bidders responding to a range of different tender exercises and will last approximately 45 minutes. Therefore, any queries or clarifications specific to this tender must not be asked in these sessions and should instead be submitted as clarification questions via the Proactis South East Business Portal.

Please follow the link below to open a calendar of upcoming bidder engagement sessions, and feel free to reserve a spot at any session that you are available to attend. The session calendar can be accessed via the following link:

[Social Value Portal \(office365.com\)](https://office365.com)

Supplementary Guidance

Remember that filling in your Social Value responses will require time and preparation, including specific quantified measures with supporting qualitative submissions as required.

Your social value bid response/submission must be done 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.

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 bidder being unfamiliar with the Portal or allowing insufficient time for uploading and/or submitting their bid response.

Any queries/requests for clarification regarding the social value bid criteria or tender requirements must be directed via Proactis, through the message function. However, if you need technical support with the Portal itself, please email the SVP support team directly at support@socialvalueportal.com. The support team are available between 09:00 and 17:00, Monday to Friday. Please allow **one working day** for responses.

A generic Social Value Portal User Guidance document is available [here](#).

4. Social Value Bid Requirements

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

- A Using data to quantify (set out against specific measures) **what** social value will be delivered during the subsequent contract's lifecycle (see '**Quantitative Social Value Response**'); and

- B** Evidence describing (in appropriate detail) **how** such social value will be delivered against each of the chosen measures and, where relevant, evidence of prior experience of social value delivery in similar fields or circumstances (see '**Qualitative Social Value Response**').

Please note that, when you have finalised your social value bid response as per A and B above and you have followed the instructions set out in this ITT document, you will be required to complete the following additional steps in the Proactis South East Business Portal ("Proactis"):

- Ensure you have clicked on the 'Click here to register' link to the Social Value Portal's website, which is contained within the Social Value box on Proactis. The link will open a new tab containing a bidder registration page and, once you have viewed this, please navigate back to Proactis in order to progress the two actions set out below.
- Enter your Weighted Social Value Score from the Portal into the 'Social Value Total Consideration' box in Proactis.
- Export a copy of your social value bid response by clicking on the 'Export Responses to PDF' button on the Portal, and then upload this PDF into Proactis when prompted to 'Complete & Upload Your Social Value Response'. This is part of completing your bid submission checklist on Proactis and should turn the red light to green once the PDF upload is completed.

Best Practice Guidance

Bidders **MUST** follow the guidance set out in SVP's '[Do's and Don'ts' video](#), which advises the best practices to use when preparing social value bid responses. It is essential that Bidders watch the video before making their submission on the Portal.

N.B. you will need to have registered for your Portal account (see the [above instructions](#)) before you will be able to access and view the video.

Quantitative Social Value Response

Bidders will be provided with online access to the set of TOMs that the Council has developed for this project through collaboration with The Social Value Portal. Bidders are required to complete and submit a response through the Social Value Calculator prior to the deadline for tender submissions. The completed Calculator forms the basis of the quantitative element of the Social Value Bid Response.

For assistance with calculating targets for certain measures, bidders should use the Unit Toolkit on the Portal, which includes, but is not limited to, the following topics:

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

The Unit Toolkit is available online through the [Social Value Calculator](#).

i. TUPE:

Local Jobs (NT1, NT1a, NT1c, NT9, NT10, NT10b):

As this contract does not involve a TUPE transfer if a new service provider is appointed, Bidders should record new and existing local jobs that would be created or sustained directly as a result of the subsequent contract only.

ii. **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 Council as to whether social value proposals are proportionate to the estimated contract value. 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.

iii. **Proportionality**

As all social value measures are optional, bidders are able to exercise their own free choice amongst the available measures, although tender responses must remain relevant and proportionate to the contract scope.

iv. **Local**

Please note that social value commitments should be appropriate to the local area.

For OCC, the 'local area' is defined as any location falling within the boundary of Oxfordshire, plus a perimeter area of 10 miles into the counties that border Oxfordshire.

A 'local business' is defined as being located and/or headquartered within the boundary of Oxfordshire or the perimeter area.

Qualitative Social Value Response

Bidders are to provide evidence against each Social Value commitment to explain how each commitment will be delivered and, where relevant, evidence of prior experience of social value delivery in similar fields or circumstances.

The Qualitative Social Value Response will consist of the following:

Description/evidence boxes:

Bidders 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 bidder or through its supply chain.

Please note the description field on the Portal has a limit of 1000 characters, although bidders can attach additional supporting information if required.

Please note that if a Bidder either:

- Makes a quantitative bid response but **does not provide any evidence** (i.e. does not complete the Evidence/Description boxes on the Social Value Calculator or does not submit a delivery plan where required) detailing how those commitments will be delivered;

OR:

- provides evidence (i.e. completes the Evidence/Description boxes on the Social Value Calculator or submits a delivery plan) about how their social value commitments will be delivered but **does not make any actual quantitative bid response**;

THEN:

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

Minimum Delivery Per Year

Unless agreed in advance with the Council, it is expected as a minimum that the successful bidder will spread out the delivery of the total social value commitment evenly across the entire duration of the contract. For example, with a two year contract, 50% of the total social value commitment should be delivered in Year 1 and 50% in Year 2.

Prioritisation of Measures

Please note that a commitment made against the TOMs measures listed in the table set out in Annex A will be valued at x2 or x3 the regular proxy value to recognise the importance of related Council priorities and encourage social value delivery in such areas. The prioritisation factors for these measures are now set out in the Portal as labels designating 'Medium Priority' (x2) and 'High Priority' (x3) where relevant to a particular measure, and such labels will be visible to all bidders participating in the tender. Please be advised that the prioritisation factors (x2 or x3) will only be applied to relevant measures (see table in Annex A) at the evaluation stage.

i. 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 so the Council can require the successful bidder to report on progress against these measures during the contract term.

5. Social Value Bid Evaluation

Social Value has been allocated a total weighting of 12%, standalone alongside quality and price, as part of the overall score for this procurement. The overall social value score for this tender will be evaluated using the following sub-weightings:

	Social Value Sub-Weighting
Social Value Quantitative Response	60%
Social Value Qualitative Response	40%

as set out in the Description / Evidence Box	
Total Social Value	100%

Quantitative Assessment:

The quantitative score will be calculated using the formula below.

The bidder submitting the highest rated Social Value quantitative offer will be scored 60% 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:

$$\frac{\text{Bidder's total Social Value offer}}{\text{Value of the highest Social Value offer from all bidders}} \times 60 .$$

Worked Example of Quantitative Evaluation (sub-weighting is 60%):

- If Tenderer X's social value quantitative offer was the highest at £100,000. They would receive the maximum 60% available (100,000/100,000 * 60%);
- Tenderer Y whose social value quantitative offer was second highest at £80,000 would score 48% (80,000/100,000 x 60%);
- Tenderer Z whose social value quantitative offer was third highest at £40,000 would score 24% (40,000/100,000 x 60%).

Bidders should note that the information submitted in the Description/Evidence Boxes on the Calculator will be used in evaluation to verify the quantitative values submitted and to ensure they meet the parameters set out below.

Qualitative Assessment:

The information provided in the description/evidence box will form the "Qualitative Evidence" and will be evaluated using the scoring mechanism set out in Table A below. The assessment will focus on the level of detail in the bidder's response, the relevance and proportionality of the social value commitments being made, how the bidder will deliver said commitments, and the bidder's capacity and capability to complete the delivery in full and on time.

Table A: Qualitative Evaluation Scoring Methodology

Responses to the Social Value Qualitative section will be evaluated using the following scoring profile:		
Score		Classification
100%	4	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. If applicable the delivery plan meets all requirements to an excellent level and provides clear, detailed evidence of how the social value is to be delivered on contract.
75%	3	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. If applicable the delivery plan meets all requirements to a good level and provides clear evidence of how the social value is to be delivered on contract.

50%	2	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. If applicable the delivery plan meets most of the requirements to a fair level and provides some adequate evidence of how the social value is to be delivered on contract.
25%	1	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. If applicable the delivery plan meets some of the requirements however the response is generally poor and lacking adequate evidence of how the social value is to be delivered on contract. Alternatively, no delivery plan was submitted however good descriptions have been provided.
0%	0	Unacceptable - No response submitted, or response fails entirely to demonstrate an ability to meet any of the requirements. If applicable no delivery plan was submitted.

Clarification of Social Value Bid Responses

The bid evaluation process may identify inconsistencies (if any) between a particular bid response and the parameters stated above and/or in SVP's [Do's and Don'ts video](#), or any inconsistency between a bidder's Qualitative Evidence and the nature or scope of the proposed contract. In such cases, the Council may seek clarification to enable the bidder to explain/justify their response. Please note that the clarification process will not enable bidders to improve their bids in any respect.

6. 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, recruit and retain those potential employees.

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

$$\text{Total Social Value Score} = (\text{Quantitative score (\%)} + \text{Qualitative score (\%)})$$

7. Remedies for Non-Delivery

There may be genuine, justifiable reasons for the non-delivery of a Social Value commitment from the successful bidder(s). In these circumstances, the Council will work with the winning bidder to determine what alternative social value the supplier will deliver instead. This alternative should be equivalent to the proxy value of the original Social Value commitment made during the tender exercise but does not have to fall within the same area of the TOMs Framework.

8. Social Value Management Fee

There is no charge for Bidders to access the Social Value Portal for the purpose of responding to this tender. However, for the successful Bidder who is subsequently awarded the contract, there is a charge of 0.2% of the total contract value, with a minimum fee of £750 per annum and capped at a maximum possible fee of £7,500 per annum. The fee is paid annually in advance of each year of the contract.

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

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.

Worked examples: Based on 0.2%

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 £3,200

$£800,000 \times 0.2\% = £1,600 \text{ per annum,}$

$£1,600 \times 2 \text{ years} = £3,200$

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 £15,000:

$£5,000,000 \times 0.2\% = £10,000 \text{ but the fee is capped at } £7,500 \text{ per annum,}$

$£7,500 \times 2 \text{ years} = £15,000$

Annex A

Prioritisation of Measures: Full Details

Please note that a commitment made against the TOMs measures listed in the table below will be valued at (x2 or x3) the regular proxy value to recognise the importance of related Council priorities and encourage social value delivery in such areas. The prioritisation factors for these measures are now set out in the Portal as labels designating 'Medium Priority' (x2) and 'High Priority' (x3) where relevant to a particular measure, and such labels will be visible to all bidders participating in the tender. Please be advised that the prioritisation factors (x2 or x3) will only be applied to relevant measures (see table below) at the evaluation stage.

Please note that any *italicised measures* included in the below table appear only in the Council's Master Set of measures and as such will not be available for bidding against where a tender exercise is instead using the Council's Light Set of measures.

Ref.	Measure	Prioritisation Multiplier (x2 or x3)
NT1a	No. of local direct employees (FTE) which are TUPE transfers retained on contract for one year or the whole duration of the contract, whichever is shorter (re-tendered contracts only - to be used at Measurement)	x3
<i>NT54</i>	<i>Support a 'just transition' for workers by supporting those in 'traditional' high carbon industries to retrain</i>	x3
<i>NT10b</i>	<i>No. weeks on the contract of apprenticeships relating to the low carbon economy - opportunities either to be completed during the year, or that will be supported by the organisation to completion in the following years - Level 2,3, or 4+</i>	x3
NT15a	Provision of expert business advice to help VCSEs and MSMEs achieve net zero carbon	x3
NT21	Equality, diversity and inclusion training provided both for staff and supply chain staff	x2
NT43	Initiatives taken throughout the local and global supply chain to strengthen the identification, monitoring and reduction of risks of modern slavery and unethical work practices occurring in relation to the contract (i.e. supply chain mapping, staff training, contract management)	x2
NT26	Initiatives taken or supported to engage people in health interventions (e.g. stop smoking, obesity, alcoholism, drugs, etc.) or wellbeing initiatives in the community, including physical activities for adults and children	x3
NT28	Donations or in-kind contributions to specific local community projects (£ & materials)	x2
NT29	No. of hours volunteering time provided to support local community projects	x2
<i>NT29a</i>	<i>No. of hours volunteering time provided to support health-care related charity and community projects</i>	x2
NT31	Savings in CO2 emissions on contract achieved through de-carbonisation (i.e. a reduction of the carbon intensity of processes and operations, specify how these are to be achieved)	x3
NT82	Carbon emissions reductions through reduced energy use and energy efficiency measures – on site	x3
<i>NT64</i>	<i>Contribution made on the contract to own carbon offsetting, either through own fund or with certified external providers (when it has</i>	x2

	<i>been demonstrated said carbon emission cannot be reduced within the contract's timeframe)</i>	
NT32	Car miles saved on the project as a result of a green transport programme or equivalent (e.g. cycle to work programmes, public transport or car pooling programmes, etc.)	x3
NT33	Car miles driven using low or no emission staff vehicles included on project as a result of a green transport programme	x3
NT67	<i>Donations or investments towards initiatives aimed at environmental and biodiversity conservations and sustainable management projects for both marine and terrestrial ecosystems</i>	x3
NT85	<i>Resources (on contract) dedicated to creating green spaces, improving biodiversity or helping ecosystems</i>	x3
NT87	Total volume of reduced plastics against a relevant benchmark	x3
NT69	Support provided internally and to MSMEs and VCSEs within the supply chain to adopt Circular Economy solutions - business case and leadership for circular economy	x3
NT72	Hard to recycle waste diverted from landfill or incineration through specific recycling partnerships (e.g. Terracycle or equivalent)	x3
NT88	Reduce waste through reuse of products and materials	x3
NT49	<i>Requirements or support (for Micro or Small enterprises) for suppliers to demonstrate climate change and carbon reduction training for all staff - e.g. SDGs Academy courses (NTs) or (e.g. RE) Supply Chain Sustainability School bronze or higher or equivalent</i>	x3