



Part 7 Social Value Requirement Information for Applicants

Contract Reference

TPL6522

Contract Title

The Strand Public Realm Works Torquay

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A Introduction

This document sets out the methodology the Council will follow to evaluate Social Value Offers 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 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 TOMs within this tender process have been developed to reflect the specific needs of Torbay Council and Applicants will be given access to them after registering on the Social Value Portal (SVP).

Please see the link below which explains how the Social Value Portal measure social value: <https://www.youtube.com/watch?v=SGo7gMitCDQ>

Please Note: the Council is not being prescriptive as to which TOMs measures are being sought from Applicants by way of Social Value proposals. Applicants are free to choose those measures that are proportional and relevant to their business and this specific contract. However, a key success factor for Applicants will be to demonstrate the ability to deliver against the commitments made.

C Social Value Bid Submissions

C1 Overall Approach

- C1.1 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.
- C1.2 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.
- C1.3 **Please Note:** Applicants should be aware of the following:
- a) Applicants' 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;

- b) 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;
- c) 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;
- d) it is important that Applicants are confident of their ability to deliver Social Value proposals made and have considered their ability to monitor and report on their commitments periodically, as the Council will contractualise these commitments with the successful Applicant.

C1.4 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 Authority whilst bearing in mind that the overall value of Social Value commitments made must be delivered by the successful Applicant.

C2 Accessing the Social Value Portal (SVP)

C2.1 The social value bid submission must be made via the SVP. Applicants should use the link below to register on the SVP:

<https://socialvalueportal.force.com/s/supplierregistration?svpprojectid=8e0-0000-1GIN7>

C2.2 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.

C2.3 If you do not already have SVP login credentials, you will be sent an email containing your username and a link to set up your password.

Please Note:

- a) the password setup link will expire within forty eight 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 you login credentials;
- b) if you do not receive a password setup email, please check your spam/junk mail folder;
- c) your username will be in the format:
[firstname.lastname@socialvalueportal.com](#)

- C2.4 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.
- C2.5 Remember that filling in your Social Value responses will require time and preparation, including specific quantified measures with supporting qualitative submissions as required.
- C2.6 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.
- C2.7 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 Applicant being unfamiliar with the portal or allowing insufficient time for uploading and submitting their social value documents.
- C2.8 Any queries/clarifications regarding the Social Value criteria or tender requirements must be directed via ProContract (www.supplyingthesouthwest.org.uk) through the message function. However, if you need technical support with the SVP itself please email the SVP directly at support@socialvalueportal.com. The SVP support team are available between 09:00 and 17:00, Monday to Friday. Please allow one working day for responses from the SVP.
- C2.9 Generic SVP User Guidance Document is available at: <https://socialvalueportal.force.com/sArticle?id=a060K00001JRIO8>

C3 Bid Requirements

- C3.1 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 how the social value being offered will be delivered against each of the measures offered (see '**Qualitative Social Value Proposal**').

C4 Quantitative Social Value Proposal

- C4.1 Applicants will be provided with online access to the set of TOMs that the Council has developed for this project through the SVP. Applicants 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.
- C4.2 For assistance with calculating targets for certain measures Applicants should use the Unit Toolkit on the Portal 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

C4.3 The Unit Toolkit is available through the Social Value Calculator:

<https://socialvalueportal--c.um5.visual.force.com/apex/unittoolkit>

C4.4 '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.

C4.5 TUPE

Local Jobs (NT1): Applicants should record new and existing local jobs that are created or sustained directly as a result of this contract only.

C4.6 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 Authority 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 Authority's instructions regarding the scope of the contract, including its duration.

C4.7 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).

C4.8 Local

Please note that social value commitments should be appropriate to the local area. For 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 find the list applicable postcodes for the sub-localities to be used in measures NT1b and NT18a in Appendix I.

C5 Qualitative Social Value Proposal

C5.1 Applicants are to provide evidence against each Social Value commitment to explain how each commitment will be delivered.

C5.2 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.

C6 Delivery Plan

C6.1 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.

C6.2 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?

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

C7 Incomplete Submissions

Please note that if an Applicant either:

- a) 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

- b) 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 Applicant's quantitative and qualitative social value submission may be treated as non-compliant and be scored 0.

C8 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.

C9 Not Used

C10 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.

D Evaluation of Social Value Offers made by Applicants

D1 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%

D2 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.

D3 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.

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.

D4 Clarification of Social Value Offers

During evaluation of bids received, if there is any apparent inconsistency between an Applicant's Social Value offer and the parameters stated above and in Appendix G Dos and Don'ts', for Applicants, or if the evaluation identifies a manifest inconsistency with the Applicant's qualitative Social Value proposals or the nature and scope of the proposed contract, the Council may seek clarification to enable the Applicant to explain/justify the methodology used and correct their bid if necessary.

D5 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. Example - if an Applicant commits to employing 10 long-term unemployed people, it should explain the partnerships in place as well as explaining how the Applicant 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 (%))

E Social Value Management Fee

E1.1 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.

- E1.2 **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.
- E1.3 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
- E1.4 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.
- E1.5 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:

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

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