

The Social Value Portal

Guidance for Bidders

N.B. Updates are continuously being made on the Portal so, for the latest version of this document, please use the following link:



<https://socialvalueportal.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJvbmU6YWxvaGFQYWdlliwiYXR0cmliZXRLcyI6eyJhZGRyZXNzIjoiaHR0cHM6Ly9zb2NpYWx2YWx1ZXBvcnRhC5saWdodG5pbmZmZm9yY2UuY29tL2FwZXQvc0FydGlibGU%2FaWQ9YTA2MEswMDAwMUUpSbE84In0sInNOYXRllip7fX0%3D>

1. Introduction

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 aim of this is to understand what value business brings to society. The Social Value Portal uses a range of robust and transparent proxies, as well as other indicators, to allow the comparison of different bids as part of a tender or procurement, and to then monitor the delivery of Social Value commitments made.

1.1. How do we measure Social Value?

The Social Value Portal uses the National Social Value Measurement Framework, also known as the National TOMs (Themes, Outcomes, Measures), to measure Social and Local Economic Value. The National TOMs framework was developed by the National Social Value Taskforce, a body combining both public and private sector organisations. It was the result of extensive consultation across its members and is endorsed by the Local Government Association.

The National TOMs provides a standardised Social and Local Economic Value measurement system. It comprises a series of objectively researched standalone measures that both public and private sector organisations can extend, or reduce, to meet their needs without compromising the integrity of the framework (provided that a consistent methodological approach is taken).

For more information, please visit <https://socialvalueportal.com/national-toms/>

Or watch our introductory video, here: <https://www.youtube.com/watch?v=SGo7gMitCDQ>

1.2. Requesting login credentials

If you have been requested to enter your Social Value data on the Social Value Portal, you will need to obtain a username and password to login. To request access to a project/tender, please visit our website using the link provided in your ITT documentation.

This will be provided in the following format:

<https://socialvalueportal.force.com/supplieraccountregistration?svpprojectid=XXX-XXXX-XXXX>

You will be re-directed to the registration web page (below) and required to provide the following information:

Request Access to a Tender/Contract on the Social Value Portal

Please enter your details here to request access to a specific project or tender on the Social Value Portal, in order to upload your Social Value targets for a specific project or contract.

- Please ensure that you include the correct Project Reference (XXX-XXXX-XXXXX or SVPXXXXX)
- Allow at least **one working day** to receive your login credentials.
- Remember that filling in your Social Value responses will require time and preparation, including specific quantified measures and in most cases a Method Statement or Description.

Once your details are checked and approved, an account will be set up for you, and details will be sent shortly via the email address you provide. Please allow at least one working day to receive your login credentials, though in most cases it will be much quicker.

Project/Tender Reference - please enter your SVP Project Reference (ask the tender/contract manager if you have not received this):*

Your Organisation - Name:*

Your Organisation - Post Code for Your Primary Location:*

Project/Tender Manager: First name: *

Project/Tender Manager: Last name: *

Project/Tender Manager: Email Address: * - all correspondence from the Social Value Portal will be directed to this address

Organisation Size: *

Sector: *

Request Access to Project

*Required

Privacy Notice

The Social Value Portal Ltd collects, stores and processes your personal details (name, email address) entered into the form above for the purpose of providing access to the Social Value Portal platform and the provisioning of login credentials, and to allow us to communicate with you with regard to your Social Value submission.

The lawful basis for processing your personal data is the legitimate interest of the Social Value Portal to process your Social Value submission, and to contact you with regard to this. We will not use this data for any other purpose.

If you have any questions, or would like to exercise your rights to manage your personal data, please contact support@socialvalueportal.com. For more information, please refer to our [Privacy Policy](#).

Fig. 1 – Bidder Registration Page

*Please enter the details of the person who will be using the Social Value Portal. All correspondence will be sent through the email address entered here. You may find a copy of our Privacy Policy at <http://socialvalueportal.com/privacy-policy/>.

The project reference you enter should be formatted as 'XXX-XXXX-XXXXX'.

Once you have submitted your request, it will be reviewed for approval by the Social Value Portal support team within **one working day**. We suggest you submit your registration at least five working days prior to the submission deadline, to allow enough time to edit, review and submit your response.

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

If you already have Social Value Portal login credentials from previous projects/tenders, you will be sent an email confirming access to the new project/tender as requested.

Please note:

- The password setup link will expire within **48 hours** of being sent; if you need a new password setup link, please email support@socialvalueportal.com or select '**forgot password**' on the Portal
- 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**

2. Logging in

To log in to your account, please navigate to:

- <https://socialvalueportal.force.com/login>

You can find this link on the Social Value Portal website, in the menu under Login/Register.

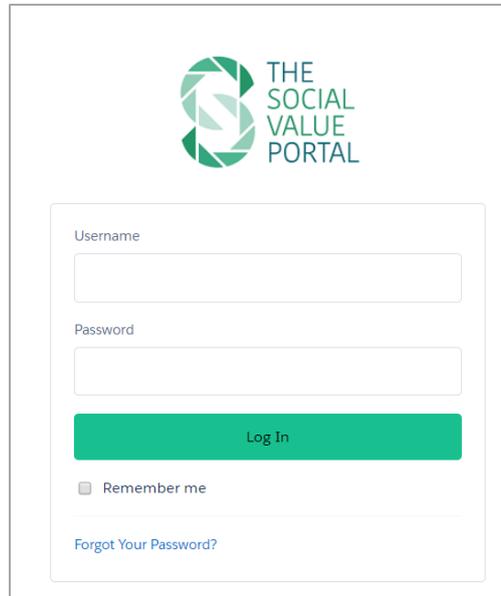
The image shows a screenshot of the login page for The Social Value Portal. At the top center is the logo, which consists of a green circular icon with a stylized 'S' and the text 'THE SOCIAL VALUE PORTAL' to its right. Below the logo is a white rectangular form with a thin border. Inside the form, there are two input fields: the first is labeled 'Username' and the second is labeled 'Password'. Below these fields is a prominent green button with the text 'Log In' in white. Underneath the button is a checkbox labeled 'Remember me'. At the bottom of the form, there is a blue link that says 'Forgot Your Password?'. The entire form is centered on a white background.

Fig. 2 – Login Page

Please note:

To ensure the best view of the Portal please use a modern browser, ideally with the latest version installed. Older browsers may not display dashboards and reports correctly.

2.1. Forgotten password

To request a password reset, please click on the 'Forgot Your Password' link on the login page, or go to: <https://socialvalueportal.force.com/secur/forgotpassword.jsp>

After you have received the reset link, please set up your new password using your Social Value Portal username, in the format *firstname.lastname@socialvalueportal.com*

Alternatively, get in touch with the Social Value Portal team at support@socialvalueportal.com to request a password reset. A new password setup email will be sent to your registered email address.

3. Start Page

Once you have logged in, you will arrive at the Start Page.

To view your account, press **CLICK HERE TO START**.



Fig. 3 – Account Welcome Page

Up to date versions of this *User Guidance* document along with *National TOMs: Guidance, Definitions, Evidence* and other resources will be available to download on this page; please check back regularly to ensure you have the latest version.

4. Your Account Page

Your Account page provides an overview of all the projects/tenders that you have registered for on the Portal.

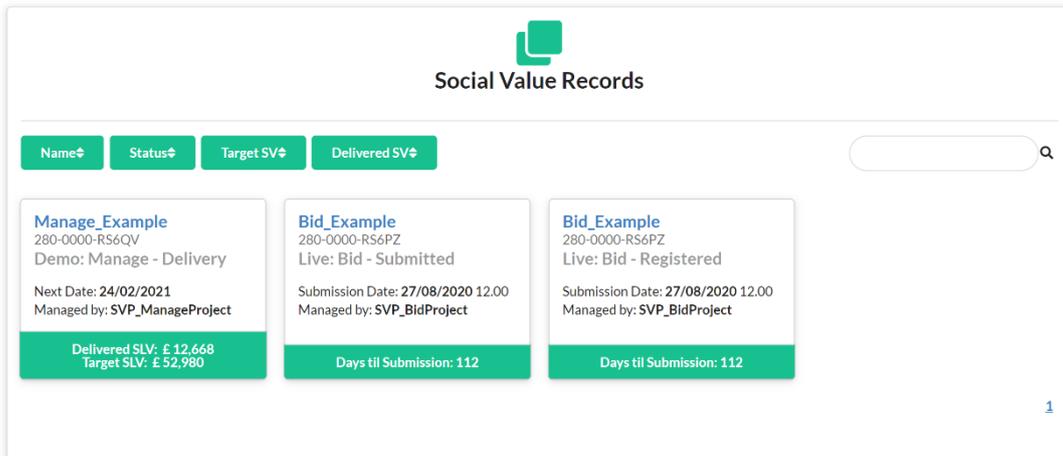


Fig. 4 – Account Social Value Records

You can sort your Records by name or status, or search for them using the search bar. Each Record overview will include:

- The name of the project/tender
- The SVP Project reference (XXX-XXXX-XXXXX) – *please quote this 12-digit reference code when contacting the Social Value Portal*
- The name of the organisation managing the project/tender
- Your project/tender status – *Registered, Submitted or Delivery*
 - Registered – you have successfully registered for your project/tender, but your Social Value response has not yet been submitted
 - Submitted – your Social Value submission has successfully been submitted
 - Delivery – User is in contract management stage (i.e. contract has been awarded and user is reporting on Social Value delivery)

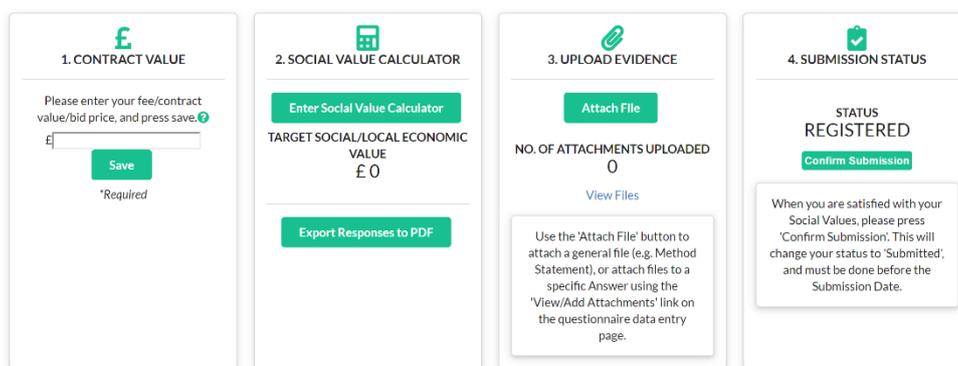
To edit or add your Social Value Responses, navigate to the specific project/tender by clicking on the project name within the card which is a link to the Social Value Record page.

5. Your Social Value submission

Your Social Value Portal account allows you to enter and edit your target/actual Social and Local Economic Value responses and upload evidence to support your response. Target values are entered during the bid phase; actual values are entered during the delivery phase.

To complete your Social Value submission, navigate to the project that you would like to edit. This will open the Social Value Record page, where you can:

1. Enter and save your project Contract Value (£) as instructed to do so by the tendering authority
2. Access the Social Value Calculator to add or edit your responses
+ and Export your responses to PDF
3. Upload general pieces of evidence, i.e. method statements (please add evidence for specific measures using the 'View/Add Attachments' links on the Calculator Page - **Ref. 6.2.4**)
4. View & confirm your submissions status



The screenshot displays four panels on the 'Social Value Record' page:

- 1. CONTRACT VALUE:** Includes a pound sign icon, a text prompt 'Please enter your fee/contract value/bid price, and press save.', an input field with '£' and '0', a 'Save' button, and a '*Required' note.
- 2. SOCIAL VALUE CALCULATOR:** Includes a calculator icon, an 'Enter Social Value Calculator' button, a 'TARGET SOCIAL/LOCAL ECONOMIC VALUE' field with '£ 0', and an 'Export Responses to PDF' button.
- 3. UPLOAD EVIDENCE:** Includes a paperclip icon, an 'Attach File' button, a 'NO. OF ATTACHMENTS UPLOADED' field with '0', a 'View Files' link, and a detailed instruction box about using the 'Attach File' button and 'View/Add Attachments' link.
- 4. SUBMISSION STATUS:** Includes a checkmark icon, a 'STATUS REGISTERED' label, a 'Confirm Submission' button, and a text box explaining that pressing 'Confirm Submission' will change the status to 'Submitted' before the submission date.

Fig. 5 – Social Value Record Page

Please note:

- Bidders are **not** required to enter a target against every measure listed on the Social Value calculator, unless the measure has been marked as **MANDATORY** by the client (*Ref. 5.2 below*)
- Bidders should only enter targets against the measures that are relevant to their delivery capabilities, that they have the capacity to deliver on contract and that are proportional to the contract. (*For further info. on target setting, please refer to the ITT and supporting guidance*)
- Bidders should **not** enter any company-wide CSR information

5.1. Entering your Contract Value

If instructed by the procuring authority to do so, you are required to enter your Contract Value (*please refer to the ITT and supporting guidance*). This value should be equal to the value provided within your overall price/qualitative submission and consistent with the expected duration of the contract. Where there is an option to extend the contract, do not include this in the value entered.

If you have questions regarding how to complete this field, please contact the procurement or contract manager for the project.

Enter the value in the 'Contract Value' box and press 'Save'.

5.2. Entering your target Social Value responses (quantitative)

To open the Social Value Calculator, click 'Enter Social Value Calculator'. This will display all questions relating to your project/tender, organised by Theme and Outcome.

Each question includes a social value Measure, a specified unit of measurement, the Social Value proxy associated with each measure, and a target description box. Any mandatory questions will be marked ***MANDATORY***.

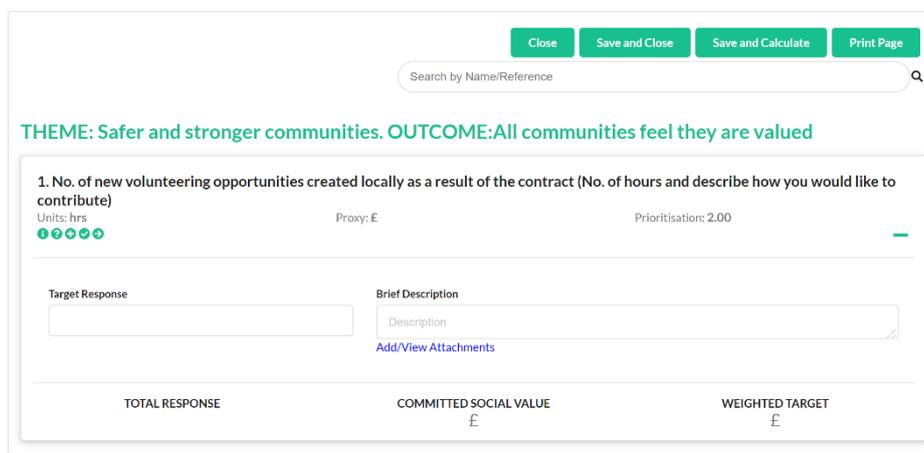


Fig. 6 – Social Value Calculator Page

Each measure in the calculator contains additional general information relating to the measure that can be accessed by hovering over the icons, as below:

On each measure hover for more informaton:

-  Definition
-  Guidance
-  Additional Details
-  Evidence Requirements
-  Link

Fig. 7 – Additional Information Icons

5.2.1. Units

Please note that there is a specified unit of measurement associated with each question. It is important that the correct units are used for each Social Value response to ensure an accurate calculation of Social and Local Economic Value.

5.2.2. Targets

Please enter Social and Local Economic Value targets for each measure you will deliver during this contract, only, ensuring that you read the question carefully and understand the units required by each measure. If successful, these targets will become contractual obligations, so please ensure you are able to deliver on your commitments.

Please note:

- You can calculate your Target Social and Local Economic Value at any time by pressing ‘Save and Calculate’. The updated Social and Local Economic Value will appear at the top of the page. When you have finished editing your responses, press ‘Save and Close’ to re-calculate and return to the Social Value Record page.
- Pressing ‘Close’ will return you to the submission page **without saving your changes**.
- Pressing ‘Print Page’ will open your browser print dialogue.
- Your session will timeout after 2 hours of inactivity. Please ensure that you press ‘Save and Calculate’ regularly to avoid losing any data. After 30 minutes of inactivity, a pop-up will display to remind you to save your data.

5.2.3. Proxy values

Where a Social Value Proxy has been linked to a measure, the calculation and resulting Committed Social Value (£) is shown alongside the target. More information on understanding proxy values is available to download from the SVP website: <http://socialvalueportal.com/national-toms/>

5.2.4. Supporting target description

Bidders should include a brief description of how they will deliver a measure in the text box provided.

If you wish to upload a longer response than the text box allows, or provide supporting documentation/evidence, you can upload this as an attachment. Click 'Add/View Attachments' to open the attachment pop-up window. Follow the instructions to upload your attachment.

Descriptions should be provided for every target response. Any target answers that do not include a clear description or supporting evidence may be discounted at evaluation stage.

Please check the Guidance, Additional Details or Target Guidance for each measure to ensure that you are meeting all relevant requirements.

5.2.5. Multiple reporting periods

If the contract duration is more than 1 year, you may be required to enter targets across multiple reporting periods, to enable effective contract management for the duration of the project.

Please note:

- All entries should be measured against the contract length stated in the ITT **without** including any potential extensions. If you are unclear about the length of the contract, contact the procurement or contract manager for the project.
- If more than one reporting period has been defined, multiple data entry fields will be displayed on the Social Value Calculator, indicated by the end date of each period. You will be required to enter targets to demonstrate what you expect to deliver during each year of the contract.

5.2.6. Prioritisation

Where deemed necessary, the procuring authority may choose to prioritise certain measures that correspond with areas of higher need or deprivation. These will carry more weight during the evaluation process of the bid but **will not** impact delivery. This will feed through into the Social and Local Economic Value calculation.

5.3. Uploading your method statement (qualitative)

To upload your Social Value method statement, please return to the Social Value Record page and click on 'Attach File'. Please upload your Social Value method statement as an attachment, along with any additional supporting information relevant to your Social Value submission.

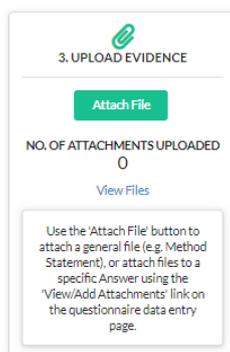


Fig. 8 – Evidence Attachment Tool

Please note that a full list of the attachments you have provided for specific questions/target Social Value responses will also be listed further down on the Social Value Record page under the ‘Evidence, Reports & Attachments’ section, as below.

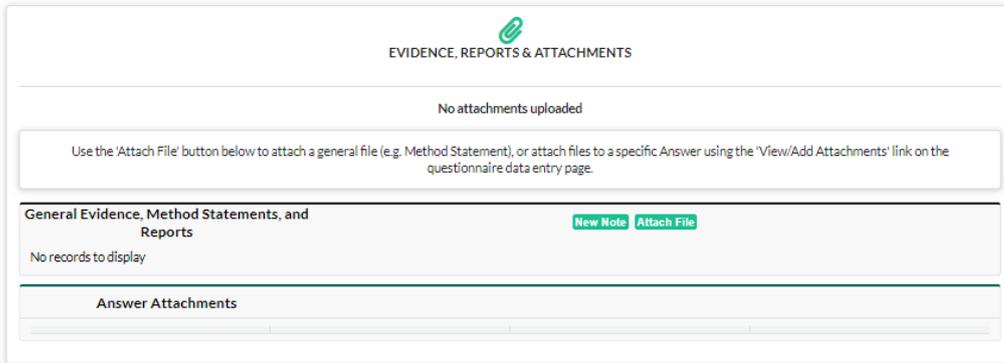


Fig. 9 – Evidence, Reports & Attachments section

5.4. Submitting your Social Value response

Once you are ready to submit your Social Value response, click ‘Confirm Submission’. This indicates that the responses are ready for submission. Please note that you can edit your Social Value response at any time up until the submission deadline by re-entering the Social Value Calculator.

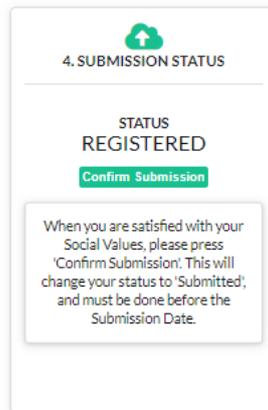


Fig. 10 – Submission Status

You must submit your Social Value response before the submission deadline. The submission deadline (date/time) is displayed on the Social Value Record page. In most cases this is the same deadline as for the procurement as a whole – please check with your procurement manager if you have any queries related to the deadline.

5.5. Export a PDF report for download

If you would like to create a PDF report detailing your Social and Local Economic Value responses against each question, use the ‘Export Responses to PDF’ button. A report will be generated and stored under the ‘Evidence and Reports’ section. To open the report in your browser, click ‘View’.

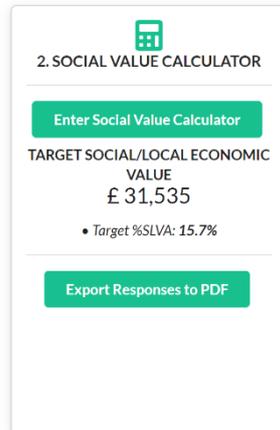


Fig. 11 – Social Value Calculator: Enter/View Responses and Exporter Tool

You may also choose to download your Social and Local Economic Value Responses, view/download a copy of all questions included within the Social Value Calculator for your specific project/tender, or Download the National TOMs Guidance, Definitions and Evidence Requirements from the Downloads section.

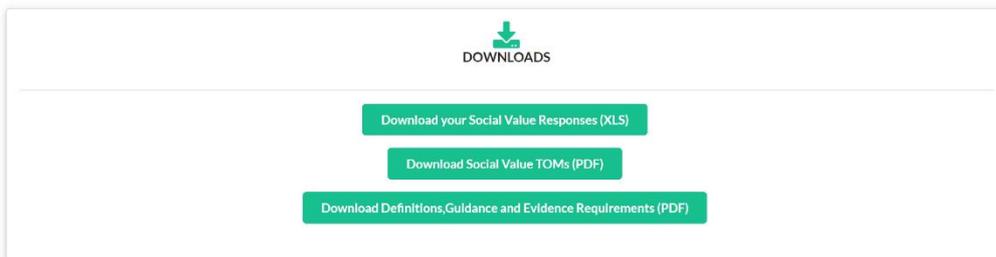


Fig. 12 – Downloads Section

6. Export Your Account Data

To export a summary of your account data, first return to your Account page *here*:

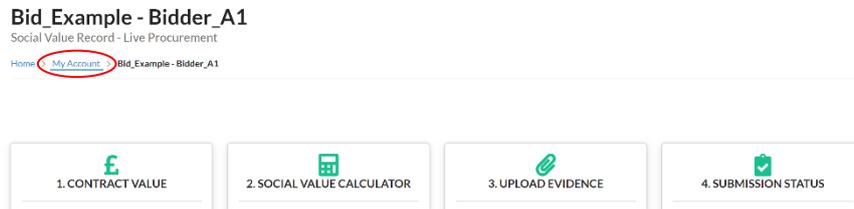


Fig. 13 – Navigation Links for the Account Page

Then, scroll down past your projects/tenders where you can download an Account Summary Report, in CSV format, that includes all your project/tenders and the following information:



Fig. 14 – Account Summary Report Download Tool

- SVP Project Reference
- Name
- Owner
- Project Type
- Contract Value (£)
- Actual/Target Social and Local Economic Value
- Actual/Target Social and Local Economic Value Added as a % of the Contract Value
- The project/tender's progress towards achieving the Target Social and Local Economic Value
- Submission status

7. Account deactivation / reactivation

The free user license that you have received to enter your Social Value responses is linked to a specific project/tender. At the end of the tender period, unsuccessful bidders' accounts will be deactivated, and your data archived. The successful bidder's account will remain active for the duration of the project, subject to payment of the contract management fee stipulated within the tender documents (where applicable). After the project has concluded (i.e. at contract completion) this account will also be deactivated, and your data archived.

All data submitted to the Social Value Portal is available on request. Please contact support@socialvalueportal.com to request a copy of your data.

If your organisation is required to complete future Social Value assessments through the Social Value Portal, you will be able to reactivate your account. Please visit the Social Value Portal website and follow the registration process outlined in section 1.2 of this document, using your new SVP reference code or link.

Please note:

If you have multiple projects/tenders active on your account, your account will only be deactivated once **all** projects/tenders have been completed.

8. Help and Support

For questions regarding your project or tender submission, such as clarifications, key dates and deadlines, please get in touch with your procurement or contract manager directly.

For technical issues or queries specifically relating to the use of the Social Value Portal, you can contact our support team in the following ways:

- Email support@socialvalueportal.com
- Use the online contact form – you can find the link at the bottom of each page on the Social Value Portal, or visit: https://socialvalueportal.force.com/VF_Help

Our support team will respond to your query as quickly as possible. Please allow up to **one working day** for a response.