

Part 7 Social Value Requirement Information for Applicants

Contract Reference

TELS5222

Contract Title

**Two to Five (2-5) Years Childcare
Nursery Provision 2023**

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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 as part of the tender pack documentation.

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 Bid Requirements

C2.1 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**').

C3 Quantitative Social Value Proposal

C3.1 Bidders will be provided with access to the set of TOMs that Torbay Council has developed for this project in the tender documentation. Bidders are required to complete and submit a response through Part 6 Award Questionnaire in line with the deadline for tender submissions. The completed Calculator forms the basis of the quantitative element of the Social Value Proposal.

C3.2 '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.

C3.3 TUPE

As this contract entails a TUPE transfer, the Council has decided that Applicants are requested not to record their local job targets against NT1/NT1b in the TOMs

calculator, during procurement. Any targets set by the Applicants against these measures will be discounted to 0.

C3.4 Contract Value

As part of their submission, Applicants are advised to input an estimate of the contract value for the full initial contract period, in Part 6 Award Questionnaire. 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.

C3.5 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).

C3.6 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 Sub-Localities.

C4 Qualitative Social Value Proposal

C4.1 Applicants are to provide evidence against each Social Value commitment to explain how each commitment will be delivered.

C4.2 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 Part 9 Social Value 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 in Part 9 Social Value Calculator has a limit of 1,250 characters however Applicants can attach additional supporting information if required.

C5 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) about how those proposals will be delivered

OR
- b) provides evidence (i.e. by completing Evidence/Description boxes on the Social Value Calculator) 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.

C6 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.

C7 Not Used

C8 Measures with no Proxy Value i.e. (£0.00)

Applicants should note that any measures in Part 6 Award Questionnaire 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	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% (£40K/£100K x 3)

Please Note: the information submitted by Applicants in the Description/Evidence Box in Part 6 Award Questionnaire 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 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
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		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 (%))