



SOCIAL VALUE MODEL TENDER RESPONSE GUIDANCE DOCUMENT

**Provision of a Recovery House Facility including Staffing on behalf
of Birmingham and Solihull Mental Health NHS Foundation Trust
(BSMHFT) and Birmingham Women's and Children's NHS
Foundation Trust Forward Thinking Birmingham**

This guidance sets out the methodology that will be followed to evaluate Social Value offers from bidders as part of this procurement in line with the Crown Commercial Services PPN 06/20.

Tender Reference: **PROC.09.005**

Date : **22/10/2024**

FINAL VERSION 20.01.22

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1. Social Value : Introduction

- 1.1. In line with the Public Services (Social Value) Act 2012 and the requirement to consider within pre-procurement planning Social Value which subsequently follows through to the inclusion within the Invitation to Tender documents criteria that reflects how this might improve the economic, social and environmental wellbeing of the area but also how it might act with a view to securing that improvement. In response to this the Crown Commercial Service (CCS) has designed a Social Value delivery model for in-scope organisations.
- 1.2. Social Value is an intricate part of a procurement process where the requirements are related and proportionate to the subject matter of the contract and should be included as part of the process rather than at present under the Act, “considered”.
- 1.3. As stated above and through a joint team from the Cabinet Office and Department for Digital, Culture Media and Sport working with the Crown's representative for Voluntary Community and Social Enterprise have designed the Social Value Delivery Model. The Social Value Model, guidance was communicated through CCS in Procurement Policy Note 06/20. The full suite and complete version of those documents are contained in the link: <https://www.gov.uk/government/publications/procurement-policy-note-0620-taking-account-of-social-value-in-the-award-of-central-government-contracts>
- 1.4. Its application applies to all procurements covered by the Public Contract Regulations 2015 and in-scope organisations.
- 1.5. The application of the Model will be required for all new procurements from 1st January 2021 and mandatory from 1st April 2022.
- 1.6. The criteria associated with the model will have a minimum weighting of 10% applied and is to be a distinct criteria set outside and not included as part of the quality criteria.
- 1.7. The Birmingham & Solihull Integrated Care Procurement Collaborative are very supportive of ensuring procured contracts on behalf of the Birmingham & Solihull Integrated Care System members reflect social and economic equality with measured and monitored outcomes to which we fully approve and endorse the central approach.
- 1.8. Where as part of a new procurement process and where requirements are related and proportionate to the subject matter this will include Social Value. This will also apply to further competitions when using frameworks following consultation with the framework organisation that we are permitted to include this and where this can fit as part of the ITT criteria.

2. Purpose of this document

- 2.1. The purpose of this document is to provide an overview on the inclusion of social value within this procurement process as per the CCS Social Value guide.
- 2.2. The information provided to Bidders within this document along with that contained in CCS PPN 06/20 will assist Bidders in responding to this specific criteria within the ITT.
- 2.3. Bidders must familiarise themselves with the contents of the CCS social Value guide and application of, within procurements :
<https://www.gov.uk/government/publications/procurement-policy-note-0620-taking-account-of-social-value-in-the-award-of-central-government-contracts>

3. Social Value Model: Themes and Policy Outcomes

- 3.1. The Social Value model sets out the Government's social value priorities for procurement.
- 3.2. It includes a menu of social value options for in-scope organisations to review and select with their internal clients and any other stakeholders. The model has five themes and eight policy outcomes, as below:

| Themes | | Policy Outcomes |
|---------|----------------------------|--|
| Theme 1 | CV19 recovery | Help local communities to manage and recover from the impact of COVID 19 |
| Theme 2 | Tackling economic recovery | Create new businesses, new jobs and new skills |
| | | Increase supply chain resilience and capacity |
| Theme 3 | Fighting climate change | Effective stewardship of the environment |
| Theme 4 | Equal opportunity | Reduce the disability employment gap |
| | | Tackle workforce inequality |
| Theme 5 | Well being | Improve Health & Well Being |
| | | Improve community cohesion |

3.3. Each policy outcome has been designed so that there is consistency with the application, (with little or no modification) evaluation and delivery within the ITT and subsequent contract(s). Therefore each policy outcome has:

- Model Evaluation Questions
- Model Response Guidance for tenderers
- Model Award Criteria and Sub-Criteria
- Reporting Metrics

3.4. The application of the theme(s) and policies to the procurement will need to consider those listed above are relevant to the subject matter, proportionate to the contract and ensure compliance with the principle of equal treatment and non-discrimination.

3.5. In applying the above this may mean that there may not be any themes that apply, all or only a select few.

4. Application of the Social Value Model

- 4.1. As part of the pre-procurement planning Procurement will engage with the Stakeholder group to explain how CCS Social Value Model works and together will determine if this is relevant and proportionate to the procurement. If it is then the relevant themes(s) and policies will be applied as part of the procurement criteria.
- 4.2. Depending on which policies are applied within the procurement the above questions, criteria and reporting metrics will be reflective of that contained within the CCS Social Value guidance.
- 4.3. The minimum weighting of 10% will be applied. If this should ever vary either through a lack of or higher market maturity this will have been demonstrated at pre-market engagement and explained as part of the tender documents.
- 4.4. Annex B7 “Social Value Evaluation - Bidder Response” highlights the respective criteria which will apply to the tender documents for this project.

5. Scoring of Social Value (Qualitative)

- 5.1. The evaluation of Social Value criteria within the ITT will be using a qualitative approach. This will reflect the quality of the social value being offered within the tender response against the selected policy outcome(s).
- 5.2. There will be a six band scoring applied from Fail to Excellent and is reflected in the table below:

| Score | Criteria |
|-------|--|
| 5 | Meets Authority's requirements exactly: the response/answer/solution gives real confidence that the Contractor will add real value and has excellent skills/experience and a deep understanding of what is required. |
| 4 | Meets Authority's requirements well but not exactly: response/answer/solution demonstrates real understanding of the requirements and confidence of ability to meet it. |
| 3 | Meets Authority's requirements in most aspects but fails in some: acceptable response/answer/solution to aspects of Authority's requirements; confidence in the Tendered skill/experience being sought resulting in minor risk. |
| 2 | Fails to meet Authority's requirements in most aspects meets in some: less than acceptable - response/answer/solution lacks convincing confidence of skill/experience being sought' lack of real understanding of Authority's requirements or confidence of ability to deliver, moderate risk that relevant skills/experience will not be available. |
| 1 | Significantly fails to meet the Authority's requirements: a detrimental response/answer/solution – limited or poor confidence of Tendered skill/experience; major risk that relevant skills/experience will not be available. |
| 0 | No response submitted. |

6. Social Value deliverables (Quantitative)

- 6.1. In order to substantiate the validity of responses from tender bids the guide has included reporting metrics (numeric outputs) for each of the policies. This is the quantitative element to the process and will be contained within the contract Key Performance Indicators (KPI).
- 6.2. Again these will also be relevant and proportionate to the subject matter of the contract to ensure consistency and accuracy of reporting.
- 6.3. Applicable reporting metrics will be added to the list of KPIs aligned to the service.

7. Contract Management of Social Value

- 7.1. Once the procurement process has been fully completed and the successful supplier(s) notified and awarded the contract, the relevant deliverables from the procurement process and the Bidders response will collectively be formed into a reporting KPI(s).
- 7.2. The KPI(s) will be reported based on the agreed reporting period to ensure that the supplier is achieving its social value objectives.