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| **Social Value ITT and Information for Bidders** |
| **94003 – Travel Rewards Mobile App to Influence Behaviour** |

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**Evaluation of Social Value Requirement – Information for Bidders**

Introduction

This Section sets out the methodology that the West Yorkshire Combined Authority (WYCA) will follow to evaluate Social Value submissions from bidders as part of this procurement. **Please note that it is essential that Bidders watch the ‘Dos and Don’ts’ and ‘how to bid and use the Social Value Calculator’ videos, which represents best practice for completing a Social Value submission, before submitting their Social Value proposal.**

This can be found here**:** <https://support.socialvalueportal.com/hc/en-gb/articles/4418109087249-dos-and-don-ts>.

And here: <https://support.socialvalueportal.com/hc/en-gb/articles/4402368311953-video-how-to-bid-and-use-the-Social-Value-Calculator>

Please note that you must have a Social Value Portal account before you will be able to access this. More information on registering on the Social Value Portal can be found in the ‘[Completing your Social Value Submission’](#_Completing_your_Social) section of this document.

Social Value Responses - Overview

WYCA 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, bidders are required to propose credible targets against which performance (for the successful bidder) will be monitored. The social value measurement framework used in this tender process has been tailored to reflect the specific needs of WYCA using the National TOMs, and bidders be able to access it after registering on the Social Value Portal.

Please note that WYCA is not prescriptive as to which National TOMs measures bidders can select to set targets as part of their Social Value proposals. Bidders are free to choose those measures that they consider appropriate. However, a key success factor for bidders will be to demonstrate their ability to deliver against the targets selected, which should be proportional and relevant to their business and this specific contract. Bidders should note that targets will be treated as contractual commitments if the bidder is successful.

Social Value Bid Requirements

Important notes

1. Bidders’ social value proposals should relate to what will be delivered directly as a result of this contract only. Social value or corporate social responsibility initiatives being delivered as business as usual and/or outside of this contract must not be included in a bidder’s social value proposal.
2. The core requirements of the contract cannot be included within social value targets – social value targets must go above and beyond what a supplier is contracted and paid to deliver.
3. Care must be taken by bidders to ensure the target levels they set align with the duration of the contract. Some target units are annualised (notably Full-Time Equivalents or FTEs), so for these measures contract durations of less than one year will require a fraction of a full FTE, while contract durations of longer than one year will require a multiple of a full FTE. Please check the guidance for further information.
4. Targets must be provided for the total duration of the contract, but for the ***initial term*** of the contract only – i.e. not including any potential extension periods. For example, if the contract you are bidding for has an initial term of 2-years with a potential extension of period of a further year (2+1), you should set your targets against the initial 2-year duration.
5. It is important that bidders are genuine and confident in their ability to deliver Social Value proposals made, as WYCA will contractualise these commitments with the winning bidder which will then be monitored and reported on periodically.
6. The bidder’s ability to deliver its social value targets will be evaluated as part of the submission, based on the supporting evidence provided by the bidders. Where evidence provided is deemed to be inadequate, targets set by bidders may be discounted.
7. Unless specified in the measure text or supporting guidance, targets should only relate to the social value that will be delivered directly by the bidder. In other words, social value delivery unlocked through wider supply chains should not be included unless this is explicitly permitted. This is in order to ensure a level playing field and reflects the likelihood that at the bid stage supply chains may not be fully contractualised.

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

A A quantified Social Value Proposal (see ‘[Quantitative Social Value Proposal](#_Quantitative_Assessment:)’ below); and

B Evidence describing the bidder’s overall approach to social value delivery for the contract and an explanation of how the social value being offered will be delivered against each of the measures offered (see ‘[**Qualitative Social Value Proposal**](#_Qualitative_Assessment:)**’** below).

1. Quantitative Social Value Proposal

Bidders will be provided with online access to a page (the ‘Social Value Calculator’) on the Social Value Portal with the TOMs that WYCA is using for this project. Bidders are required to complete and submit a response through the Social Value Calculator on the Social Value Portal, before the deadline set for tender submissions. The completed Calculator will form the basis of the quantitative element of the Social Value submission.

For assistance with calculating targets for certain measures bidders should use the Unit Toolkit on the Portal which 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

The Unit Toolkit is available through the Social Value Calculator, once you have registered for the project, here: <https://socialvalueportal--c.um5.visual.force.com/apex/unittoolkit>

How ‘local’ is defined for the tender

Bidders must ensure that their proposals meetWYCA’s definition of ‘Local’. Please read this section carefully.

Local Economic Value targets in the Social Value Calculator must be deliverable in the local area as defined by this procuring authority.

Local Economic Value targets are covered by the following measures:

* Local employment**:** NT1/NT1b/NT1c [or equivalent – procuring authority to amend accordingly]; and
* Local supply chain spend (NT18/NT19)

[For WYCA, ‘local’ is defined as being within the WYCA boundary area].

For other measures in the Social Value Calculator that do not refer to ‘local’ within the measure description (i.e. *not* NT1/NT1b/NT1c or NT18/NT19), targets can be delivered outside the WYCA boundary area, but the WYCA has a preference for delivery of Social Value targets locally.

Local Jobs and TUPE transfers

Bidders must take care to ensure that the targets they set for local jobs are consistent with the WYCA’s requirements and calculated correctly based on Full-Time Equivalents (FTEs). In addition, the bidder should note the following:

Bidders should record new and existing local jobs that are created or sustained directly as a result of this contract only.

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 Authority as to whether social value proposals are proportionate to the contract. 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.

1. Qualitative Social Value Proposal

Bidders must provide evidence against each Social Value commitment to explain how each commitment will be delivered.

The bidders’ Qualitative Social Value Proposal will consist of the following:

1. Description/evidence box

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 1,000 characters; however, bidders can attach additional supporting information if required. Any additional supporting documents should be no longer than one side of A4.**

1. Delivery Plan

The aim of the Delivery Plan is to enable evaluators to determine whether bidders are properly resourcing, managing and are capable of delivering their Social Value submission. The delivery plan should elaborate on the following:

* The name of the person who will be responsible for delivery of the Social Value submission made by your company, details of how social value delivery will be managed in the organisation and resources that will be deployed.
* Bidders should provide clear evidence that they can identify, source, deliver and report on each target set.
* Bidders should include the timeline for delivering the social value submission.
* 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.
* Details of processes for engagement and collaboration with relevant local stakeholders, including Voluntary Community and Social Enterprises (VCSEs) in the delivery of Social Value, identifying key stakeholders needed to support the plan and setting out detailed plans for the early phases on engagement.

Non-compliant proposals

Please note that if a Bidder either:

1. Makes quantitative proposals (by setting targets in the Social Value Calculator) but fails to provide any supporting evidence in the relevant Evidence/Description boxes on the Social Value Calculator (or through relevant descriptions in a completed Delivery Plan) about how these proposals will be delivered; ***OR***
2. Makes a qualitative submission (i.e. by entering information in the Evidence/Description boxes on the Social Value Calculator (or through completion of a Delivery Plan) but does not make any actual quantitative proposals by setting targets in the Social Value Calculator, then,

**WYCA reserves the right to treat both the bidder's quantitative and qualitative scores as non-compliant and will be scored 0 (zero).**

Measures with no Proxy Value (Measures with a proxy value of £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 as WYCA may request the successful bidder to report on progress against these measures during the contract term.

Completing your Social Value Submission

The social value bid submission must be made via the Social Value Portal. You should use the link below to register for the tender regardless of whether you already have Social Value Portal login credentials or not.

|  |  |
| --- | --- |
| Name of project: | Travel Rewards Mobile App to Influence Behaviour |
| Reference: | Sl0-0000-0s6Rp |
| Registration link: | <https://app.socialvalueportal.com/s/supplierregistration?svpprojectid=Sl0-0000-0s6Rp> |

Once you have completed your registration, you will receive an email to confirm that you have successfully registered for the tender. The email will include:

* A username, typically in the following format: [firstname.lastname@socialvalueportal.com](mailto:firstname.lastname@socialvalueportal.com)
* A password link which expires within 48 hours of being sent

**Please note:**

1. If there are any errors or missing pieces of information, you will not be able to register, and a system message will be displayed. For any technical assistance, please email [[support@socialvalueportal.com](mailto:support@socialvalueportal.com)](mailto:support@socialvalueportal.com)
2. To reset your password, please use the following link: [Forgot Your Password](https://socialvalueportal.force.com/secur/forgotpassword.jsp?orgId=00D28000000L57N)
3. Please allow at least one working day to receive your login credentials and check the email has not been moved to your spam/junk mail folder

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

Your Social Value response/submission must be undertaken 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 and then reupload.

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 submitting their social value documents.

Please ensure that you click ‘Confirm Submission’ after completing your submission before the tender submission deadline. Please allow plenty of time before the deadline; last minute submissions risk not being accepted if there is a lag in the upload.

Any queries/clarifications regarding the Social Value criteria or tender requirements must be directed via WYCA’s eProcurement portal, YorTender, through the message function.

For any technical support with the Portal, please email the [support@socialvalueportal.com](mailto:support@socialvalueportal.com).. The Social Value Portal Support team are available between 09:00 and 17:00, Monday to Friday. Please allow **one working day** for responses.

Once you have registered and logged into the Portal, you will also have access to the Social Value Portal Support site which includes a series of articles on using the Portal. You can access the Support site once you have registered and [logged into](https://socialvalueportal.force.com/SiteLoginLWC?utm_source=newsletter&utm_medium=email&utm_campaign=Zendesk_launch%22%20t%20%22_blank) the Portal via the ‘Support’ button at the bottom left hand side of the Portal.

Evaluation of Social Value Submissions made by Bidders

The Social Value score has been allocated a maximum of 10% of the overall quality/price matrix for this tender, which will be evaluated using sub-weightings on the following basis:

|  |  |  |
| --- | --- | --- |
|  | **Social Value Sub-Weighting** | **Share of overall quality / price matrix** |
| Social Value Quantitative submission | 50% | 5% |
| Social Value Qualitative submission (Evidence of Delivery plus a Delivery Plan ) | 50% | 5% |
| **Total Social Value score** | **100%** | **10%** |

1. Quantitative Assessment:

The quantitative score will be calculated using the formula below.

The bidder submitting the highest aggregate target value (after any discounting made as a result of the evaluation) in their Social Value proposal will be scored the maximum available score for the quantitative element of the social value scoring, subject to satisfactory evidence being provided to support the proposal.

All other bidders will be scored in relation to the highest Social Value submission as follows: -

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1. 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 methodology set out for Quality scores in the full ITT pack. The assessment will be based on an overall assessment of the quality of the proposal, including the Bidder’s capacity to deliver Social Value offers made, based on the evidence provided by the bidder. Please note any information provided through clarifications that was not part of the original submission will not impact the qualitative scoring.

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.

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

Total Social Value Score = (Quantitative score (%) + Qualitative score (%)

Clarification of Social Value offers

The WYCA has defined the period when Bidders can ask clarification questions which ends ***before*** the tender submission deadline. Bidders should refer to the procurement timetable information in the ITT pack.

You are strongly advised to ask any questions as soon as possible and well in advance of the clarification question period deadline. This should include any questions about the Social Value component.

In keeping with good practice, the WYCA will endeavour to evaluate Social Value offers based on the information provided. Bidders should not expect evaluators to seek missing information as a matter of course before determining the score.

During evaluation, the WYCA may, at its absolute discretion, require bidders to clarify certain aspects of their bids in writing.

Clarification may be sought if there is a material and manifest inconsistency in the quantitative or qualitative elements of a bidder’s Social Value offer. This does not apply to circumstances where bidders have not correctly followed the guidance provided; in this case the WYCA reserves the right to correct or discount the relevant qualitative or quantitative element without further clarification.

It is therefore essential that bidders watch and understand the ‘Dos and Don’ts’ and ‘how to bid and use the Social Value Calculator’ videos, and seek additional guidance from the WYCA ahead of the clarification deadline.

The WYCA reserves the right to discount and award a score of zero if a bidder fails to respond within the time required, or to provide an adequate response to support the social value claim for a measure.

Please note that if it is required, the clarification process will be used to ensure that proposals are compliant with the TOMs methodology and is not an opportunity for bidders to increase their social value proposals and on no account should any attempt be made to negotiate.

Remedies

Bidders should note that Social Value targets set by bidders will be treated by the procuring authority as contractual commitments if the bidder is successful, and bidders will be expected to report regularly on delivery against these targets as part of contract management, using the Social Value Portal.

There may be genuine and justifiable reasons for the non-delivery of a Social Value offer from the winning contractor. In these circumstances WYCA will initially seek to engage with the winning contractor to determine what issues are impeding social value delivery. It will expect the winning bidder to have a coherent rectification strategy. This could include other social value proposals to an equivalent £ Social & Local Economic Value figure, if these also meet the Contracting Authority’s criteria.

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 0.150% 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 Bidder 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.

|  |  |
| --- | --- |
| **Example A:**  The total contract is £800,000 for a project/contract duration of 2 years: | **Example B:**  The total contract is £5,000,000 for a project/contract duration of 2 years: |
| **The successful contractor would be required to pay the SVP £2,400**  **£800,000 x 0.150%. = £1,200 per annum,**  **£1,200 x 2 years = £2,400** | **The successful Bidder would be required to pay the SVP £15,000:**  **£5,000,000 x 0.150%= £7,500, however, the fee is capped at £7,500 per annum,**  **£7,500 x 2 years = £15,000** |

**Appendix A – Sample SVP Letter of Engagement**

*Dear [Name],*

*I am pleased to advise that we have received confirmation from [Council Name] that you have been awarded the contract in respect of [Name of Project/Contract]. You will recall that the tender required the successful bidder to report its social value delivery under this contract using the Social Value Portal.*

*SVP will now support you with the reporting on your social value targets and support your access to the Portal, by providing:*

* *Online account with Social Value Portal to allow contract management and project reporting, showing progress against targets*
* *Technical support with data entry (e.g., access and functionality issues)*
* *Verification of data and evidence to satisfy requirements*
* *End of project summary report*

*Your access to the Portal is carried forward from when you made the original bid, and we appreciate that this may have been a while ago. Therefore, if you need confirmation of your login details, please let us know and we can resend or amend as required or contact support@socialvalueportal.com.*

*As part of the tendering and registration process, you agreed to our Terms and Conditions. A copy of these can be found on our website (https://socialvalueportal.com/terms-and-conditions/.).*

*In your tender, you proposed a target of £[XXX] social and local economic value and these commitments will now be monitored over the course of the contract. You are required to input data on the Portal quarterly, in line with the reporting periods displayed on your online social value record. Data should be input ahead of the quarterly deadline to allow for the data and evidence to be reviewed in a timely manner.*

*The annual fee for this service was set out in the “Social Value Management Fee” section issued as part of the invitation to tender. Fees are charged on an annual basis, depending on your contract duration (please see invoicing schedule below for further information.) Based on the contract value of £[XXX], your annual fee is £[XXX] + VAT, at the standard rate.*



## Find out more westyorks-ca.gov.uk

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All information correct at time of writing