



# **Social Value – potential bidder webinar**

**Oldham Borough Council**



# agenda

**What Social Value Portal?**

**How is Social Value calculated using the TOMs framework?**

**How do I submit my bid on the Portal? (portal demonstration)**

**How are submissions evaluated?**

**Dos and don'ts**

**What help is available?**

# Introduction to the Social Value Portal

# Social Value Portal is the market leader in social value measurement and reporting

Our management tool helps organisations to calculate their social value in terms of environmental, social and economic contributions.

We help you to measure, manage and maximise your broader contribution to society.



# Core services

Our mission is to engage, enable and empower people and organisations to work together in the pursuit of social, economic and environmental wellbeing, to Make Good Go Further



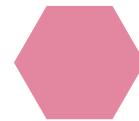
## Measurement

A nationally-approved accounting methodology for measuring social value



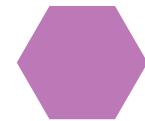
## Procurement

A platform to manage the tender process and to unlock social value in the supply chain



## Contract management

An interactive solution designed to set targets and manage performance and store evidence



## Reporting

Live reporting with interactive dashboards and displays

# How social value is measured

# Oldham TOMs



The National TOMs were developed by Social Value Portal in collaboration with **40 public, private and third sector organisations**, and endorsed by the Local Government Association.

Oldham Core TOMs is a set of 49 measures chosen to match Oldham Council's priorities.

- A consistent measurement solution that **creates a level playing field for businesses**
- Designed to **embed social value into procurement** or measurement activities
- Allows **benchmarking** and **comparability**
- Gives practical ways of **creating more social value** for communities
- Themes of **visionary** social value creation

5

Themes

17

Outcomes

49

Measures



Jobs



Growth



Social



Environment



Innovation

Endorsed by





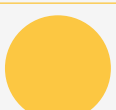


Mapped to



# National TOMs Framework

## Example application of the National TOMs

THEME	OUTCOME	MEASURE	UNIT	VALUE
 <p><b>JOBS:</b> Local skills and employment</p>	More opportunities for disadvantaged people	No. ex-offenders employed	No. people	£24,269/pp
 <p><b>GROWTH:</b> Responsible and local business</p>	More opportunities for local SMEs and VCSEs	Spend in local supply chain	£ spent	Local Spend
 <p><b>SOCIAL:</b> Healthier, safer &amp; more resilient communities</p>	Vulnerable people are helped to live independently	No. voluntary hours	No. hrs	£16.93/hr
 <p><b>ENVIRONMENT:</b> Decarbonising and safeguarding our world</p>	Carbon emissions are reduced	Tonnes CO <sub>2</sub> e reduced	tCO <sub>2</sub> e	£244.63/tCO <sub>2</sub> e
 <p><b>INNOVATION:</b> Social innovation</p>	Safeguarding the natural environment			

**TOTAL SOCIAL VALUE = SUM (MEASURES x VALUE)**



# What do we capture?

## Social Value

- Measures within the TOMs framework where we can see net additional benefits to **both** the local community and wider society.
- Does not change in the framework on a project basis.

## Local Economic Value

- Measures within the TOMs framework where the benefit to the direct local economy is impacted through local spend and local employment on a specific contract.
- Uses alternative localised industry multipliers per contract.

# Social and Local Economic Value Add (%)

Per £1 spent, how  
much value am I  
delivering?



Total SLEV value  
————— \*100  
Total Contract Value

# What is a Measure made of?

Theme



Reference

The objective

**Outcome** more working with the community

**Measure description** no. of hours volunteering time provided to support local community projects

What the measure is about

What you need to count

**Unit** no. staff volunteering hours

**Evidence requirement** local projects supported, volunteering activities, partner organisations, no. hours

What you need to provide

The financial value

**Proxy type** hourly rate based on the average salary of people reporting volunteering hours

**units**  
**20** staff  
volunteering  
hours



**proxy**  
**£16.93**

$$20 \times \text{£}16.93$$



**social value**  
**£338.60**

# Portal demonstration

# How submissions are evaluated

# Quantitative score

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- Bidders must provide a quantified Social Value Proposal and an explanation of how the social value being offered will be delivered against each of the measures offered
- Bidders submit their social value offers using the TOMs framework.
- Choose which measures to set targets against.
- Some measures may be mandatory. Some measures may have a prioritization weighting – check the ITT for details.
- Base your offers on what is relevant and proportional to the contract and your own business operations.

## Scoring

Highest SLEV offer (after any discounting during evaluation) receives 100% of available score

Other offers:  $\frac{\text{Bidder social value offer}}{\text{Highest social value offer}} \times 100 = X\%$

## Example

### Bid 1

SV quant. £500,000 – scores 8% (of 8% available)

### Bid 2

SV quant. £250,000 – scores 4% (of 8% available)



# Qualitative score

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The qualitative score is based on evidence provided for each commitment. A delivery plan may also contribute to the qualitative score. The scoring matrix used for the social value qualitative score will be provided in the ITT.

## What evidence should I provide?

### Per measure:

- A description based on the TOMs target guidance
- A breakdown of how your target was calculated based on the measure unit (e.g. FTE)
- You can also include examples of past successful delivery

### Overall

- A delivery plan (ITT will confirm if this is required).

## Tips

- ◆ Download the TOMs measure guidance as a PDF from the Social Value Calculator on the Portal, or hover over the help buttons on each measure as you're entering your bid to see the measure description and target guidance
- ◆ You can attach your evidence as a document. Maximum of five files permitted per bidder.

[Download TOMs Guidance \(PDF\)](#)

On each measure hover for more information: ⓘ Definition ⓘ Target Guidance ✓ Evidence Required ➤ Unit Guidance ⚙️ Technical Rationale (£) ⛶ Help Text

# Target guidance

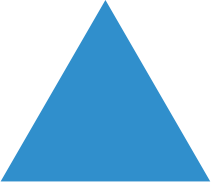
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## Measure

No. ex-offenders employed

## Target guidance



Summarise your strategy for employing your target number of 18+ year old rehabilitating or ex-offenders on this contract. For example, it is likely you will need to cooperate with job centres or other specialist organisations so please specify the organisations you intend to partner with and how you will approach working with them.

# Dos and don'ts

# National TOMs Dos & Don'ts Video



- A simple, infographic video to explain the Dos & Don'ts principles
- Also available in 10 shorter videos

[Watch here](#)

1. **Accounting for employment**
2. **Double counting**
3. **Definition of local**
4. **Additionality**
5. **Proportionality**
6. **Evidence**

# Do's and Don'ts: DO account for employment correctly



**Remember** that FTE, stands for full-time equivalent on the contract.



**Example 1:** If you hire 3 local people to work on an 8-week contract, this equals 0.5 FTE



**Example 2:** If you hire 1 local person on a 12-month contract, but they will dedicate only half of their time to this contract, this equals 0.5 FTE

Time spent on project (Full Time)	Full Time Equivalent
12 months	1
6 months	0.5
3 months	0.25
1 month	0.083
1 week	0.019

# Do's and Don'ts:

## DON'T double count



**What is Double Counting?**



Double counting is when you count the target / deliverable under two or more measures.



**Example 1:** If hours volunteering in the local community are claimed, these same hours cannot also be claimed under hours volunteering on local school / college visits.



**Example 2:** If you count local employed under NT1, you cannot also count these wages within your local supply chain spend NT18.

# Do's and Don'ts:

## DO remember the definition of local



All social value commitments should be appropriate to the local area



Definition of local specified by the contracting authority in the ITT – generally within the boundaries of the local authority





# Do's and Don'ts:

## DON'T include core contract work



Social value is all about additional value, therefore you cannot count any work or volunteering that is part of the 'core contract' offer



**Example 1:** If your 'core contract' offer includes low-emission vehicles, then the carbon savings from these vehicles cannot be included within the supplier's social value offer



**Example 2:** If your 'core contract' offer involves supporting people back to work, this cannot be included within your social value offer

# Do's and Don'ts:

## DO remember proportionality



Bidders should ensure that their proposals are relevant and proportional to this specific contract



The proposal must relate directly to the contract in question and should be proportional to the overall contract value (for example: social value bids that are in excess of 100% of the contract price may not be deliverable)



The proposal must relate directly to the initial term of the contract in question (not including any potential extensions) unless otherwise stated

# Do's and Don'ts:

## DO provide supporting information for every commitment



The supporting information that you provide is an important contributor to your qualitative submission



**Example 1:** You commit to 16 hours of school talks



**Supporting description:** Identify local schools to work with, provide a break-down of the figure, explain the support that will be provided



**Example 2:** You commit to hiring 3 local people (FTE)



**Supporting description:** Explain how jobs will be advertised, provide a breakdown of the FTE figure, identify key local partners that will be partnered with to secure these employees

# Where to go for help

# If you have any questions...

▶ **Specific tender related** questions must be directed via the Council e-procurement portal 'The Chest', as detailed in the ITT documents.

Social Value Portal can only assist with **Portal related queries** in the tender process. Contact [support@socialvalueportal.com](mailto:support@socialvalueportal.com).





**Getting started**  
Everything you need to know to get started with the Portal

**Using the Portal**  
Learn how you can use our online solution

**Your account**  
Master the ins-and-outs of your team and user management

**Training & resources**  
We'll guide you through tutorials, webinars and more.

**Social value and beyond**  
Learn more about social value and how the National TOMs work

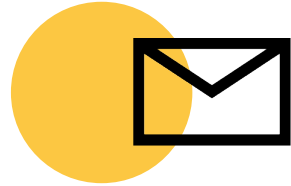
**Troubleshooting & support**  
Troubleshoot issues and review technical guidelines

**Billing**  
Manage billing information and payments

**Updates & integrations**  
Keep up with all of the latest product releases & updates

**Security & privacy**  
Find answers to many common questions about privacy and your data

# Thank you



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