**Scoring Social Value in Construction Contracts**

**Guidance**

**for**

**Public Bodies**

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# Introduction

This is a practical guide on how to score social value in public tender competitions for Construction Contracts in accordance with the [Procurement Policy Note (PPN) 01/21 (Scoring Social Value Policy)](https://www.finance-ni.gov.uk/publications/ppn-0121-scoring-social-value). The guidance should be used by all bodies covered by NI Public Procurement Policy.

PPN 01/21 mandates that from 1 June 2022 tenders (where the Public Contract Regulations apply) must include a minimum of 10% of the total award criteria to social value.[[1]](#footnote-1)

PPN 01/21 covers social, environmental and economic objectives and requires public bodies to score social value using an outcomes-based framework which has four broad themes:

* increasing secure employment and skills;
* building ethical and resilient supply chains;
* delivering zero carbon, and
* promoting well-being.

**Before following this guidance you should have read PPN 01/21.**

Whilst there are additional ways of maximising the social value delivered through public procurement, this guidance focuses on including social value in the award criteria of a tender competition.

Guidance related to the other opportunities Commissioners and Procurement Advisors have throughout the various stages of the procurement process to maximise social value is available on SIB’s Social Value website.

**Whilst every effort has been made to ensure that the information contained herein is accurate, this toolkit is not provided as ‘legal advice.’ Users should therefore seek such advice before using this material in any formal contracting process.**

# Scoring Social Value – Procurement Legislation

The procurement regulations specifically mention ways of incorporating social value into specifications, contract performance clauses, selection criteria and award criteria.

This means that the social, environmental and economic considerations can be included when a contracting authority is evaluating which tender response represents best value for money and, consequently, to which tenderer the contract should be awarded.

# Scoring Social Value - Best Value for Money

Considering social value in the evaluation of tenders is also supported by definition of ‘best value for money’ approved by the NI Executive in 2011.[[2]](#footnote-2) The definition states that the best value for money is *‘the most advantageous combination of cost, quality and sustainability to meet customer requirements’*. In this case, sustainability is defined as *‘economic, social and environmental benefits, considered in the business case, in support of the Programme for Government’*.

# Thinking Social: the pre-procurement stage

Taking social value into account early in the procurement process means it can be designed in such a way as to maximise social value and deliver best value for money. There are opportunities to maximise social value across the procurement timeline, but the greatest opportunity exists early in the process. PPN 01/21 states:

*How social value will be included in contracts should be considered at the earliest possible stage. Considering the social value element of the contract at pre-procurement (i.e. business case) stage will ensure that the procurement strategy maximises the social benefits delivered by contracts.[[3]](#footnote-3)*

Thinking about social value early in the procurement process gives you time to consider the social value **impacts** of what is being procured and to plan how to address the risks or opportunities identified. All of the following elements can contribute to the social value delivered through a contract:

* the design of the procurement, e.g. use of Lots/frameworks; sufficient timeline for responses, simplified process (no duplication), concise tender documentation, proportionate contract conditions;
* the specification, e.g. the ethical and environmental impact of what is being procured, the fair work practices required in the delivery of the services;
* the supplier selection, e.g. minimum standards are proportionate to the contract and do not inadvertently disadvantage a micro/small business enterprise or VCSE;
* the evaluation (scoring social value); and,
* the contract management to ensure social value outcomes are monitored and reported on.

By taking time to examine the opportunities to maximise social value throughout the procurement process, you can ensure that the Public Sector is achieving Best Value for Money.

## Pre-procurement engagement

**What you should do at the pre-procurement stage:**

* Engage with external stakeholders;
* Use the feedback to refine your procurement documents; and
* Develop your business case to include this feedback.

Pre-procurement engagement can help identify opportunities to maximise social outcomes for each procurement competition and will allow you to:

* understand the market capacity and capabilities, particularly in relation to Voluntary, Community and Social Enterprise (VCSE) sector organisations;
* identify different delivery models to meet your objectives;
* highlight any potential barriers to delivery; and,
* identify how the market could enhance and maximise opportunities to add social value.

This engagement is a good opportunity to raise social value with potential suppliers and the VCSE sector. Giving them the opportunity to provide feedback on how social value can be maximised can lead to:

* more innovative social value initiatives; and
* better social value outcomes.

Pre-procurement engagement is also a good way to communicate your commitment to social value.

## Community Engagement

PPN 01/21 states:

*“It is recommended that Departments consult with communities affected by the procurement and with potential suppliers to identify the most feasible and beneficial way to promote social value. Expert procurement and legal advice may also be sought as part of these deliberations.”[[4]](#footnote-4)*

Engaging with stakeholders whilst the procurement documents are being developed will help you to tailor the Social Value Initiatives to help deliver the greatest impact for those communities impacted by the procurement.

Community engagement can be significant in shaping the social value that is delivered through a project. It is important to engage particularly where services are being delivered within the communities, to ascertain what their needs are and how they can best benefit from the project being delivered in their area. You should engage with stakeholders in the community when designing the services and the social value requirements of a contract. (Similarly, it is important that the successful Supplier also engages with the community who are impacted by the project to ensure that the Supplier is tailoring the social value delivered to the issues that matter most to the community.)

This type of engagement ensures that communities where projects are being delivered are part of shaping the social value derived – it is not done ‘to’ them, but with them. It helps to foster a sense of ownership of the project and to communicate the benefits delivered to communities.

Early engagement on contracts also allows time for community groups to identify and support people who may wish to avail of the opportunities and to register their organisation on the ‘Find a Broker’ database on the Social Value Unit’s website.

## Business case

PPN 01/21 sets out the need to include social value at Business Case stage of the procurement:

*social value outcomes can be included in the procurement process provided that they are considered at business case stage and relate to the subject matter of the contract or the performance of the contract.[[5]](#footnote-5)*

Better Business Cases NI is the primary guidance for NI Departments on the development and review of business cases. The guidance provides a clear framework for appraising, developing and planning projects and programmes using the Five Case Model to deliver best social value for money.

[Supplementary Guidance](https://www.finance-ni.gov.uk/publications/better-business-cases-ni-supplementary-guidance) specifically related to incorporating social value into business cases is available on the Department of Finance’s website. The supplementary guidance sets out the relevance of social value to each section of the Five Case Model, followed by guidance on how to quantify social costs and benefits when appraising options. This should be read in conjunction with other guidance on the [Better Business Cases NI website](https://www.finance-ni.gov.uk/articles/better-business-cases-ni).

# Buying Social: Social Value Themes and Indicators

PPN 01/21 provides a framework of themes and indicators which are linked to the Programme for Government outcomes. A common framework enables suppliers to develop a shared understanding of the social value requirements which will be taken into account and how they will be scored.

## Increasing secure employment and skills

This theme aims to create employment and training opportunities, contribute to in-work progression and skills development, create opportunities for entrepreneurs and support economic growth.

|  |  |  |
| --- | --- | --- |
| **THEME 1: Increasing secure employment and skills** | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** |
| * **Our economy is globally competitive, regionally balanced and carbon-neutral** * **We have an equal and inclusive society where everyone is valued and treated with respect** * **Everyone can reach their potential** * **People want to live, work and visit here** | **1.1 Create employment, retraining and other return to work opportunities for those furthest from the labour market** | Paid employment |
| Work placements |
| Skills development and educational attainment |
| Digital skills development, cyber security awareness training and educational attainment |
| **1.2 Create employment opportunities particularly for those who face barriers to employment and/or who are located in deprived areas** | Paid employment |
| **1.3 Create employment and training opportunities in industries with known skills shortages or in high growth sectors** | Paid employment |
| Work placements |
| Skills development and educational attainment |
| Digital skills development, cyber security awareness training and educational attainment |
| **1.4 Support in-work progression and educational attainment in the workforce, including training schemes that address skill gaps and result in recognised qualifications, to help people to move into higher paid work by developing new skills** | In-work progression and skills development |
| **1.5 Increase the representation of disabled people in the contract workforce** | Paid employment |
| **1.6 Support disabled people to develop new skills and recognised qualifications** | Skills development and educational attainment |
| Digital skills development, cyber security awareness training and educational attainment |
| **1.7 Create opportunities for entrepreneurship and help new, small organisations to grow, supporting economic growth and business creation.** | Inclusion of Social and Micro Enterprises in the contract’s supply chain |
| Business development and knowledge sharing |

## Building ethical and resilient supply chains

This theme aims to tackle employment inequality, reduce the risk of modern slavery and human rights abuses within the supply chain, and promote diverse and secure supply chains.

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| --- | --- | --- |
| **THEME 2: Building ethical and resilient supply chains** | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** |
| * **Our economy is globally competitive, regionally balanced and carbon neutral** * **Everyone can reach their potential** * **People want to live, work and visit here** * **Everyone feels safe - we all respect the law and each other** | **2.1 Demonstrate action to promote collaboration and a fair and responsible approach to working throughout the supply chain** | Fair Work strategy for the contract |
| In-work progression and skills development |
| **2.2 Demonstrate action to promote ethical supply chains and practices; and, identify and manage risks of modern slavery and human rights abuses in the delivery of the contract, including in the supply chain.** | Human Rights strategy for the contract |
| Ethical Supply Chain strategy for the contract |
| **2.3 Maximise security of supply, for example by minimising proximity of supply chains to point of delivery** | Supply Chain Resilience and Capacity strategy for the contract |
| **2.4 Create a diverse supply chain to deliver the contract including new businesses and entrepreneurs, start-ups, SMEs and VCSEs.** | Inclusion of MEs, which are in their first 48 months of trading, in the contract's supply chain |
| Inclusion of VCSE sector organisations in the contract's supply chain |
| Business development and knowledge sharing |

## Delivering Zero Carbon

This theme aims to promote environmental benefits, influence environmental protection and improvement and work towards net zero greenhouse gas emissions.

|  |  |  |
| --- | --- | --- |
| **THEME 3: Delivering Zero Carbon** | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** |
| * **We live and work sustainably – protecting the environment** * **Our children and young people have the best start in life** | **3.1 Deliver additional environmental benefits in the performance of the contract including working towards net zero greenhouse gas emissions.** | Environmental Strategy for the contract |
| Waste and Resource Efficiencies in the delivery of the contract |
| Environmental Awareness Initiatives |
| **3.2 Contract specifications that support environmental protection and improvement.** | Conducting pre-contract engagement activities with supply chain organisations to develop the most relevant requirements to support environmental protection  Developing specifications designed to support environmental protection and improvement throughout delivery of the contract |
| **3.3 Supply chains that minimise carbon footprint and emissions.** | Supply Chain Strategy for Reducing Carbon Footprint and Emissions |
| **3.4 Companies employ low or zero-carbon practices and/or materials.** | Carbon Reduction Strategy for the contract |
| **3.5 Assessing and minimising embodied carbon.** | Strategy for Assessing and Minimising Embodied Carbon |

## Promoting Wellbeing

This theme aims to improve the health and wellbeing of the contract workforce, tackle employment inequality, contribute to in-work progression and skills development, and improve community integration.

|  |  |  |
| --- | --- | --- |
| **THEME 4: Promoting Wellbeing** | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** |
| * **We all enjoy long, healthy, active lives** * **Everyone can reach their potential** * **We have a caring society that supports people throughout their lives** * **We have an equal and inclusive society where everyone is valued and treated with respect** | **4.1 Support the health and wellbeing, including physical and mental health, in the contract workforce** | Health and Wellbeing strategy for the staff employed on the contract |
| **4.2 Influence staff, suppliers, customers and communities through the delivery of the contract to support health and wellbeing, including physical and mental health** | Health and Wellbeing initiatives |
| **4.3 Promote equality, diversity and inclusion in the contract's workforce** | Equality, Diversity and Inclusion Strategy |
| In-work progression and skills development |
| **4.4 Allocate a percentage of the budget to artwork or cultural activities** | Allocating a percentage of the budget to artwork or cultural activities |
| Community engagement activities to determine the most relevant artwork or cultural activities |
| Activities to promote the artwork or cultural activities to community groups |
| Activities to promote supply chain opportunities related to the artwork or cultural activities to micro businesses, social enterprises or organisations within the arts, cultural and heritage sectors |

# The Social Value Points Model

In order to deliver the Social Value Themes and Indicators in a consistent and transparent manner, the Social Value Model has been developed. The Social Value Model includes standard wording to be included at each stage of the procurement journey, making it straightforward for both the public and private sector to implement.

The Social Value Model uses social value points to ensure social value outcomes are delivered through public sector contracts in a measureable, proportionate and flexible manner.

Each Social Value theme from PPN 01/21 is broken down into indicators which are linked to social value initiatives. Each initiative has been allocated a number of social value points or has been deemed a Mandatory Requirement for Construction Contracts where the Public Contract Regulations apply. (When the Contracting Authority has a clear rationale for doing so, they can amend the points values to reflect their priorities.)

The contracting authority has the ability to tailor the Initiatives to meet their Departmental policy aims by identifying priority groups they may wish to incentivise the Supplier to work with. (See ‘Tailoring Indicators to reflect priority groups’ below.)

## How does the Social Value Points Model work?

The Social Value Model requires that the Supplier deliver a minimum of 100 social value points per £1m of contract value (and pro-rata) and a number of Mandatory Requirements.

The Supplier will have flexibility to choose which initiatives they deliver against from the Contracting Authority’s selected list, giving them the benefit of aligning the requirements of the Contracting Authority with their own business models or solutions and with feedback gathered through community engagement.

The Contracting Authority will set out within the tender documentation the Mandatory Requirements and the minimum number of additional points that the contractor is required to deliver based on the estimated contract value at the time of procurement.

The Contracting Authority may also set minimum mandatory targets for specific social value initiatives which have a points allocation within the Social Value Points Matrix and Delivery Plan, which the Contractor must deliver as part of the overall social value requirements on the Contract. For example a Contracting Authority may indicate that a minimum of 50% of the points target must be achieved through employment initiatives.

Tenderers will be required to submit a Social Value Delivery Plan confirming that they will deliver the Mandatory Requirements and setting out how they will deliver the specified minimum number of points with the tender. They will be asked to complete a methodology detailing how they will ensure the required social value points are delivered (there is no need for them to include a methodology for the Mandatory Requirements). The methodology will evaluate a number of areas including:

* timescales for delivery of the social considerations requirements;
* the resources, both internal and external, that the tenderer will use to plan and deliver the social considerations;
* the activities the tenderer will undertake to deliver the social considerations selected within the completed Social Value Delivery Plan including how they will engage with key stakeholders (e.g. social value beneficiaries, organisations within the voluntary, community and social enterprise sector); and
* how the planned activities are additional to activities the tenderer already undertakes.

**These are the steps you are required to follow:**

* Include social value at the pre-procurement stage.
* Ensure social value has been incorporated into your business case;
* Set an indicative minimum number of social value points to be delivered based on 100 points per million pound of contract value.
* Select your award question to include in the quality submission document.
* Prepare the Social Value Delivery Plan.
* Ensure contract performance clauses are included in the conditions of contract and the social value question and model award criteria are included in the procurement documentation.
* Evaluate the responses against the model award criteria.

**A minimum weighting of 10% of the overall award criteria should be applied (this will be subject to review from June 2023).** Model wording for each of the stages set out above is available on the Social Value Unit’s website.

## Tailoring Indicators to reflect Priority Groups

Some initiatives within the Social Value Model can be tailored to target the initiative’s outcomes specifically to disadvantaged groups which the Contracting Authority is particularly invested in. For example, the Department of Justice has a strategic responsibility for justice and, as a result, may want to target employment, skills and training opportunities to people with a conviction.

The Social Value Points Model gives Contracting Authorities the ability to incentivise Suppliers to deliver social value outcomes to your priority groups by increasing the social value points the social value initiative is allocated.

When the Contracting Authority would like to include priority groups in the Social Value requirements of a contract, they should include the ‘Contracting Authority’s Priority Groups list in section 4 of the Model text for inclusion in the Specification and/or Invitation to Tender.

When the contract is awarded, the Social Value monitoring system will monitor the social value outcomes delivered. The monitoring reports generated by the system will allow the Contracting Authority to understand who the beneficiaries of each social value outcome has been, including a breakdown to include priority groups. In this way, the Social Value monitoring system reports can be used to achieve and report delivery against Contracting Authority strategic priorities and Programme for Government responsibilities

## Benefits of Social Value Points Model

* The Social Value Model sets quantifiable social value outcomes which supports effective contract management as contracting authorities have a clear understanding of exactly what is required to be delivered and can quickly assess Supplier performance via the monitoring reports.
* The Social Value Model evaluates tenders on a qualitative assessment basis thereby not disadvantaging VCSEs and microbusinesses.
* All Suppliers are required to report on progress against the outcomes using the Social Value monitoring system.
* With some procurements it is difficult to fully assess if certain social considerations are feasible as each tenderer’s solution may be different (e.g. labour requirements may be unknown, TUPE may apply etc.) therefore, having a system that provides the Supplier with choice represents a low risk approach.
* The social value requirements are linked to the subject matter of the contract.
* Targets are based on the invoiced value which ensures proportionality.

# Scoring Social Value - Communications

When evaluating social value as part of the award criteria of a tender competition, you should make reference to social value at the following procurement stages:

* Pre-procurement (see Thinking Social section above)
* Business Case (see Thinking Social section above)
* Tender Stage

## Tender Stage

It is important to notify tenderers that a contract includes social value. For example, this could be done in the ‘description of the procurement’ section on the online tendering portal. **You can use the following text:**

*Under this procurement the Supplier will be required to support the Client's social value objectives. Accordingly, contract performance conditions and/or award criteria may relate, in particular, to social value.*

## Contract Documentation

The social value requirements are usually included as a Schedule in the Conditions of Contract or as an appendix to the Specification. **You need to include the following within the Social Value section:**

* The policy basis for the social value theme
* Measurable social value indicators
* Monitoring and reporting arrangements
* Contract management (key performance indicators and sanctions for non-delivery)
* Data Protection requirements (if appropriate)

**Model wording for inclusion in the contract documentation is available to download at** [**https://buysocialni.org/procurement/procurement-resources/**](https://buysocialni.org/procurement/procurement-resources/)

## Invitation to Tender

**You need to include the following in the Invitation to Tender:**

* An award question focussed on achieving the indicators under the selected theme and setting out the award criteria.
* Supplier guidance setting out what their response should address.
* The scoring matrix.

### Social Value Delivery Plan

**Can the Social Value Points Model apply to frameworks?**

The Social Value points approach can be applied to frameworks as the targets are linked to contract value.  The Social Value Delivery Plan should include an indicative contract value per Contractor and the equivalent number of Social Value Points required.

If social value is to be included as criteria at call-off stage:

* this must be explicitly provided for in the framework agreement
* there should be no duplication of questions set in the procurement documentation for the framework agreement.

If social value was not included as part of the criteria for the framework agreement it cannot be included at Call-Off stage.

You will request a Social Value Delivery Plan in response to the social value award criteria when using the Social Value Points Model and you know the estimated contract value at the time of procurement.

Tenderers will be required to submit the Social Value Delivery Plan, setting out how they will deliver the specified minimum number of points, as part of their response to the Social Value award criteria. **A standard Social Value Delivery Plan is available on the social value unit website. Please ensure you use the correct version for your contract as there are different ones for Build and Civils contracts.**

**Model award criteria and supplier guidance are available on the website**

Wherever possible you should copy the model award criteria and supplier guidance into the tender documentation. If appropriate, you can make adjustments to the model evaluation questions and supplier guidance to:

* ensure relevance to the subject matter of the contract;
* respond to feedback gained through pre-procurement engagement;
* ensure compliance with the principles of equal treatment, non-discrimination and proportionality; and/or to
* satisfy/achieve specific strategic priorities.

### Example Scoring Matrix

Social Value should be scored in in the same way as any other evaluation criteria designed to assess quality. You should develop a scoring matrix to suit the procurement and allow clear differentiation between tenderers’ responses to the Social Value question.

An example Scoring Matrix is provided below for reference only.

You are encouraged to set a minimum threshold for the social value criteria (e.g. a tenderer’s response will be rejected if they score 2 or below for the social value criteria)

|  |  |
| --- | --- |
| **Criteria for awarding score** | **Score** |
| **Excellent:**  Excellent response that has addressed all of the requirements of the criteria. Leaves no doubt as to the capability and commitment to deliver what is required. The response comprehensively addresses how the tenderer will deliver the social value requirements. | 5 |
| **Good:**  Good response that refers to all of the requirements of the criteria.  The response addresses all aspects of how the tenderer will deliver the social value requirements, although further details are required to be fully comprehensive. | 4 |
| **Adequate**:  Adequate response that refers to the majority of the requirements of the criteria. There are no significant areas of concern. The response addresses most aspects of how the tenderer will deliver the social value requirements. | 3 |
| **Limited:**  Limited response that only refers to a minority of the requirements of the criteria. The response is limited because of one or all of the following:   * There is at least one significant issue needing considerable attention. * The response is not directly relevant to the question. * The response makes limited reference to how the tenderer will deliver the social value requirements. | 2 |
| **Poor:**  Poor response that makes negligible reference to the requirements of the criteria. The response is poor because of one or all of the following:   * There are multiple significant issues needing considerable attention * The response is not directly relevant to the question * The response makes scarce reference to how the tenderer will deliver the social value requirements. | 1 |
| **Fail**:  The response fails to address any of the requirements of the criteria or no response has been provided. | 0 |

# Evaluating social value award criteria

Under the Scoring Social Value Model, panel members assess and score the quality of the social value response at evaluation stage, in the same way as they would do for any other evaluation criteria designed to assess quality.

Panel members will consult the scoring matrix that was included in the contract’s Invitation to Tender. Panel members must award marks against the objective, non-discriminatory scoring criteria set out for each scoring band, on a tender by tender basis (i.e. quality responses must not be compared against each other for the purpose of scoring).

## Tips for tender evaluation panel members

* Familiarise yourself with the award criteria, scoring matrix, the relevant schedule in the Conditions of Contract, the clarification responses on social value issued to tenderers and make sure the tenderer’s response is in the format set out in the procurement documentation.
* The response should be evaluated based on *how* the tenderer will achieve the indicators, not based on how much the tenderer has promised to deliver. The tenderer cannot receive extra credit for promising to deliver greater quantities of social value than what was asked for.
* If mandatory social value requirements have been set, check that the tenderer has confirmed that they will meet these mandatory requirements.
* Only evaluate against the requirements set out in the procurement documentation.
* The tenderers social value offering should relate specifically to this contract. The tenderer should not receive credit for general Corporate Social Responsibility policies.
* Ensure you have provided full justification for each score.

# Monitoring social value

Where Social Value requirements are included in the contract they must be enforced. To facilitate this, the Supplier must provide you with progress reports as set out in the contract.

There is a robust Social Value monitoring system in place so that, at intervals as stated in each contract, the Supplier must provide a report on their Social Value requirements, e.g. details of the number of weeks work experience opportunities delivered or the number of hours of health and wellbeing initiatives delivered as a result of the contract.

The monitoring reports generated by the system will allow the Contracting Authority to understand who the beneficiaries of each social value outcome has been, including a breakdown to include priority groups. In this way, the Social Value monitoring system reports can be used to achieve and report delivery against Contracting Authority strategic priorities and Programme for Government responsibilities.

The Social Value monitoring system is a web-based system that works in the following way:

* Once a contract with Social Value Points has been awarded, **you must inform the Social Value Unit at SIB.** You will also need to inform the Unit if the contract is delayed and when the contract has completed. You can contact the Social Value Unit at [info@buysocialni.org](mailto:info@buysocialni.org);
* The Unit will set up the contract in the Social Value Monitoring Portal, prepopulating the Social Value Points targets included on the contract, and issue the Supplier with login details and guidance on how to add information relating to the delivery of their targets;
* The Supplier will receive a reminder to update the report; however, Suppliers can log in to the monitoring portal at any time;
* Suppliers record their progress to date against each indicator. (There is also a notes section which Suppliers should be encouraged to use to record any efforts that they have made to fulfil their targets); and,
* A report will be sent from the system at regular intervals to both the Supplier and Client Project Managers. This report should be regularly reviewed during progress meetings to determine if the Supplier is on track to deliver their targets.

**Data Protection**

Where people are employed under a social value initiative, Data Protection Legislation, including GDPR should be complied with and a data protection consent form should be signed by all beneficiaries. The Contractor, at contract award, shall enter into a Data Processing Agreement with the Strategic Investment Board.

# Contract Management

Social Value is part of the contract and should be adequately managed to ensure that it is delivered in line with contract commitments and that value for money, which is a main driver behind the inclusion of Social Value, is achieved.

**‘Find a Broker’**

The ‘Find a Broker’ section on the Social Value Unit website lists organisations that can help Contractors meet their Social Value requirements. These organisations tend to be Voluntary, Community or Social Enterprise organisations, and employability providers.

The brokers can be searched by sector, geographical area, job role and employee characteristics to help Contractors find a suitable organisation to help them meet their particular Social Value requirements.

There is a downloadable guide to the ‘Find a Broker’ section of the website available at: [https://buysocialni.org/Contractors/Contractor-resources/](https://buysocialni.org/contractors/contractor-resources/)

The reputation of a Department and Supplier can be damaged by a poorly managed contract that does not deliver the expected outcomes.

The Social Value requirements which have been included in the Invitation to Tender and supporting contract papers should be reviewed by the Supplier and Contract Manager at the Contract Initiation Meeting.

It is the responsibility of the Client Project Manager to regularly monitor and review the contract including:

* Assessing reports on how the Social Value obligations are being delivered, and;
* Addressing any under-achievement.

**TIP**:If the KPIs put as much emphasis on the Social Value requirements as on other performance measurements you are more likely to achieve the outcomes you specified.

## Key Performance Indicators

Social Value can be included in KPIs which should be clearly drafted, achievable and reflect the importance of the Social Value to the project as a whole. You will need to conduct frequent reviews to ensure data is being collated and reported.

## Managing Poor Performance

**TIP:** Including Social Value as a standard agenda item at Contract Review meetings ensures that Social Value remains a priority for both the Contracting Authority and Contractor throughout the lifetime of the contract.

Continued poor performance cannot be ignored and Departments should work with the Supplier in order to ensure they meet contract requirements.

**Summary on Contract Management**

• Contracts with Social Value Points must be notified to the Social Value Unit at [info@buysocialni.org](mailto:info@buysocialni.org)

• The Social Value Unit will set up the contract in the Social Value Monitoring Portal which will be used to generate the progress reports

• Progress reports will be sent out monthly and should be reviewed regularly at progress meetings

• It is the Contract Project Manager’s responsibility to ensure the Contractor’s performance is monitored and poor performance is addressed

1. A review of the Scoring Social Value Policy will take place in advance of June 2023 with the intention of increasing the minimum weighting to 20% subject to the approval of the Executive. This guidance will be updated to reflect any changes to the Scoring Social Value policy following the review in 2023. [↑](#footnote-ref-1)
2. <https://www.finance-ni.gov.uk/articles/definition-best-value-money> [↑](#footnote-ref-2)
3. PPN 01/21, p.6. [↑](#footnote-ref-3)
4. PPN 01/21, p. 6 [↑](#footnote-ref-4)
5. PPN 01/21, p.4. [↑](#footnote-ref-5)