

Social Value at Southwark

Social Value Toolkit for Suppliers

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Introduction

Southwark's Procurement Framework mandates the inclusion of Social Value within all council contracts. This is supported by the Social Value Framework which provides the methodology for securing, evaluating, monitoring, and reporting activity from our supply chain.

This toolkit provides a comprehensive guide for bidders and suppliers looking to do business with Southwark Council, and includes:

- A definition of Social Value
- Details of the council's approach and methodology
- A guide to bidding
- Best practice when delivering Social Value
- How to monitor and report activities

For additional support, please reach out to socialvalue@southwark.gov.uk

What is Social Value?

'Social Value' refers to the positive contributions that an organisation delivers beyond its core obligations which benefit the local:

1. Community
2. economy
3. and environment

The term was first introduced by The Public Services (Social Value) Act 2012. The Act places a responsibility on public sector authorities to consider how wider economic, community and environmental benefits could be delivered as part of commissioning services. The council has agreed to include the procurement of supplies (goods) and works within its working definition of Social Value.

We have adopted the following definition of Social Value:

'A method whereby the council ensures our suppliers meet the needs for goods, works and services in a way that delivers value for money whilst maximising the potential of our borough, making it fairer, greener and safer for all our residents.'

Goals & objectives

Social Value is the golden thread which connects our strategic goals set out in Southwark 2030 and the priorities within our Council Delivery Plan, to our procurement and contract management practices.

Therefore, our approach is guided by the six goals from Southwark 2030 that have been co-designed with residents and partners:

1. Decent homes for all
2. A good start in life
3. A safer Southwark
4. A strong and fair economy
5. Staying well

Social Value Framework

Our Social Value Framework for Southwark governs our approach to securing meaningful Social Value contributions for our residents within procurement, contract management and wider activities at the council.

Framework requirements

In line with the minimum standards of conduct set out in our Procurement Framework, Social Value will be used as part of the evaluation methodology for the tender award in all contracts.

Contracts with a total value of £100,000 and over will include Social Value with a minimum weighting of 10% of the overall tender score alongside price and quality.

For contracts with a total value below £100,000, Social Value requirements will be determined on a case-by-case basis and the weighting will reflect the relative importance of Social Value to the subject matter of the contract.

A case-by-case approach will also apply when commissioning contracts with the VCS to determine proportionate requirements.

The methodology

The council has created a Social Value methodology for evaluating and reporting our supply chain's Social Value commitments consistently, robustly, and transparently during the procurement and contract management cycle.

The methodology combines measures from the Social Value Portal Open Access TOM System™ (OATS) with a set of Southwark-specific measures to capture Social Value outcomes in financial and non-financial terms. All measures follow best practice guidance on Social Value measurement and are mapped to the vision and goals from Southwark 2030. Each of the measures is supported by guidance available through the council's website. Please visit our Social Value Framework for more information and the full list of measures.

Developing your bid

This section provides guidance for developing a Social Value bid for Southwark Council.

Overview of tender requirements

As part of tendering, bidders are required to complete a Social Value Submission sheet specifying their Social Value commitments which is then uploaded to ProContract alongside their price and quality submission ahead of the tender deadline.

Bidders will choose from a list of Social Value measures, selected for the contract, and complete the following as part of their bid:

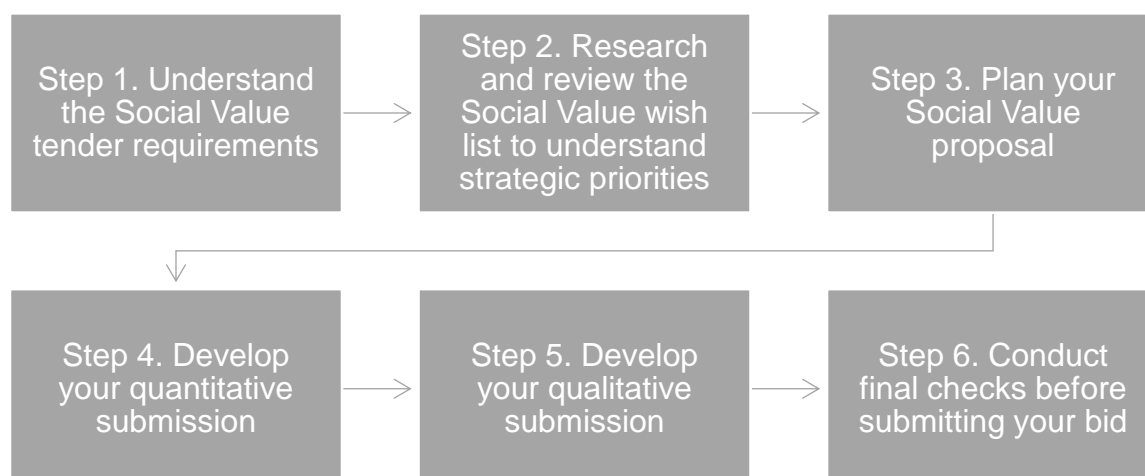
1. Quantitative submission: numerical Social Value targets against chosen measures
2. Qualitative submission: supporting method statements to describe how they intend to deliver each activity including an indicative timeline for delivering the activities throughout the contract duration

For strategic procurements, bidders are also required to provide a delivery plan which provides additional details needed to support their Social Value proposal. Please refer to your tender documentation or see the Social Value Framework for further information.

Responses will then be evaluated and scored by the council. Please refer to your tender documentation for the specific Social Value scoring methodology.

Step-by-step

Below is a step-by-step for bidders to follow when submitting their Social Value bid for Southwark



Step 1 – Understand the requirements

Bidders should read the tender documents thoroughly, making sure to note submission deadlines and mandatory upload requirements. All relevant documents should be reviewed to ensure full understanding of how Social Value offers will be scored. This includes the Invitation to Tender (ITT) and Social Value Submission Sheet.

Step 2 – Research

Bidders should review the selected Social Value measures (within the Submission Sheet, local needs and strategic objectives of the council. Key resources include:

- [Southwark 2030](#)
- [Council Delivery Plan](#)
- [Southwark Insights Hub](#)
- [Economic Strategy](#)
- [Digital Strategy](#)
- [Climate Strategy](#)
- [Southwark Stands Together](#)
- [Community Plans](#)

The 'Social Value Wish List' tab in the Submission Sheet provides suggested Social Value activities from the council under each of the Social Value measures. The wish list should help to inform the commitments proposed; however, bidders should not feel limited by this list and can propose additional, innovative activities. In addition, the council has listed priority groups where the Social Value activities should be targeted.

Step 3 – Planning

Ahead of setting their Social Value commitments, bidders should identify a person responsible within their organisation who will oversee delivery, and ensure their proposal aligns with their organisation's capacity. Bidders should:

- Identify relevant internal resources and capabilities
- Review past performance
- Identify local partnerships or networks

Providing these details as part of your bid will add credibility. Social Value commitments should be realistic, measurable and achievable, and most importantly add positive value to Southwark communities.

Step 4 – Develop your quantitative submission

When developing their quantitative submission, bidders should set clear numerical targets ensuring these are in line with the measure units. The units aren't always what you would expect, for example, apprenticeships are measured in 'no. of weeks'.

Using the Social Value Submission Sheet, bidders will input a target figure for the chosen measures in alignment with the measure unit. The total Social Value commitment will automatically be calculated for each measure.

Each Social Value measure is supported by guidance. Please refer to the guidance for example activities to deliver under each Social Value measure, priority groups, useful contacts and more details.

Step 5 – Develop your qualitative submission

Bidders should then develop their method statements to support each of their numerical targets. As a minimum, qualitative submissions must include the following:

- An overview of the activity/initiative
- A breakdown of the target calculation (ensuring any investments of staff time use the correct proxies i.e. £17.48p/h general time, £106.34p/h expert time)
- Details of any supporting partners you may work with to deliver your commitments i.e. local VCS organisations, existing services or Southwark Anchor Institutions
- An estimated timeline of delivery, ensuring the timeline is achievable and aligns with the contract duration

The word limit for each supporting description is 300 words.

For strategic procurements, bidders are required to submit a 1,000 word delivery plan containing the following details (check the tender wording to see if this a requirement):

- Stakeholder engagement plan- who are the relevant stakeholders and how will they support the proposal?
- Leadership and resources – who will be accountable and what resources will be invested?
- Processes in the event something goes wrong – how will issues of non-delivery be rectified?
- Continuous improvement plan – how will feedback will be used to exceed the requirements?

Step 6 – Final checks and upload to ProContract

Before uploading their Social Value Submission Sheet to ProContract, bidders should ensure they have filled out the information required in the 'Tender details' tab and conduct final checks for the following common errors:

| Common inconsistency/error | Final check |
|--|--|
| Target double counted | Have any targets been double counted under two or more measures? |
| Target breakdown provided is not consistent with target number | Have you provided an accurate target breakdown (using the correct proxies for staff time) as part of your method statement? |
| Proportionality | Have you committed to activities which are proportional to the value and duration of this contract? |
| Additionality | Have you ensured that your commitments are above and beyond core contract requirements and additional to existing corporate activity? |
| Not a relevant activity | Is your proposed initiative relevant to the Social Value measure? Have you checked the guidance to ensure that your target will be accepted? |

Top tips and ‘what good looks like’

1. **Demonstrate your understanding of local needs** by referencing key issues, council priorities, strategies or local needs data and how these will be addressed through your commitments
2. **Provide evidence of existing local relationships or proposed partnerships** with named organisations in Southwark
3. **Commit to activities that are relevant to the contract but always additional**
4. **Be specific** about your project plan and resources i.e. who will be responsible in your team, the allocated budgets and time to be invested
5. **Describe how the benefits will last** beyond the contract period
6. **Include relevant evidence of previous delivery**

Delivering Social Value for Southwark

Once a tender has been awarded, the winning supplier’s Social Value commitments are formalised as part of the contract.

This section covers how suppliers can deliver meaningful Social Value, their contractual responsibilities and best practice when monitoring progress against Social Value commitments.

Delivering meaningful Social Value

All Social Value activity should be appropriate to the local area and provide tangible and long-term benefits for residents and the economy, community, and environment.

Local is defined as within the local authority boundary of Southwark. Click [here](#) for an interactive map of the borough. When delivering against their Social Value commitments, suppliers should:

- Be led by local needs and priorities
- Ensure all Social Value activities are attributable to the contract, their organisation and the supply chain
- Ensure all Social Value activities are additional to the core contract requirements and existing corporate activity
- Engage with residents and local organisations, including the VCS, to deliver targeted and meaningful activities

Consider how Social Value activities will deliver long-term impact and continue to benefit the community after the contract ends. See an example below.

| Example measure | Low-impact delivery | High-impact delivery |
|---|---|--|
| SC6 Support for community initiatives to prevent and reduce crime and anti-social behaviour | <i>A supplier donates £1,000 to a national charity focused on crime prevention. The charity operates across the UK and has no direct link to Southwark. The supplier is not involved in how the funds are used, and no follow-up activities are developed. There is no engagement with local organisations, and no strategy to ensure the donation contributes to long-term crime reduction in the borough.</i> | <i>A supplier partners with a Southwark-based organisation supporting people at risk of involvement in crime. The supplier co-delivers a work experience programme for young ex-offenders, with mentoring from their employees. In addition, the supplier provides funding to an outreach worker from the charity to run crime prevention workshops at a nearby secondary school. These initiatives are designed and delivered with the aim of continuing beyond the life of the contract through resource handover.</i> |

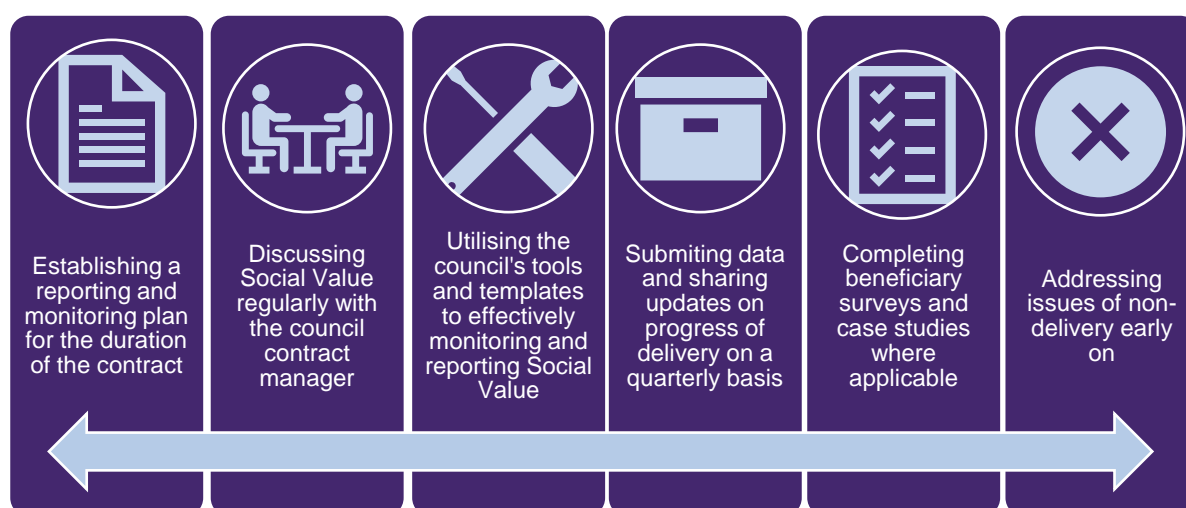
Reporting and monitoring

Social Value commitments form part of the contractual agreement between the council and the supplier for all contracts. Therefore, the delivery of these commitments should be monitored in the same way that the rest of the contractual agreement is.

We have adopted a two-step measurement and reporting solution to support our aspirations to understand and demonstrate the full impact of the Social Value Framework on our residents and communities. This includes the monitoring of both qualitative and quantitative data using our Social Value methodology and additional impact reporting tools such as surveys and case studies.

Roles and responsibilities

In line, with Southwark's Social Value Framework requirements, suppliers are responsible for:



Social Value Monitoring Sheet

To support with measurement against our Social Value Framework Methodology, we have created a Social Value Monitoring Sheet. Suppliers must monitor the delivery of Social Value activity against their commitments by populating the sheet and sharing updates quarterly with the council.

4. Social Value monitoring

Please specify any delivered Social Value commitments in this tab. Please input your data within the appropriate contract quarter depending on when the activity was delivered. Please specify the dates/months/years for each contract quarter. Please quantify your delivered data using the Units shown in column E. Please ensure supporting evidence is provided for each commitment reported. For more information on evidence requirements please visit '6. Guidance' tab. Please add additional contract reporting quarters if applicable.

| Southwark 2030 Goal | Measure Reference | Measure | Unit | Proxy value | Total Social Value commitment | Contract quarter 1 | | | |
|----------------------|-------------------|--|---|---------------|-------------------------------|---|---------------|---|---|
| | | | | | | Insert dates/months/years e.g. 01 January 2025 - 31 March 2025 | | | Insert dates/ |
| | | | | | | Delivered Social Value (please quantify your delivery data using the unit shown in column E) | ESV delivered | Supporting evidence (please review the evidence requirements in the guidance tab) | Delivered Social Value (please quantify your delivery data using the unit shown in column E) |
| Decent homes | SC1 | Support for initiatives to tackle homelessness and rough sleeping | Contract resources donated inc. time, materials, equipment, space etc (£) | £1.00 | | | £0.00 | | |
| Decent homes | SC2 | Support for resident facilities which promote decent homes, great estates and strengthen community networks | Contract resources donated inc. time, materials, equipment, space etc (£) | £1.00 | | | £0.00 | | |
| Decent homes | SC3 | Provision of free housing advice and support for residents (e.g. home safety talks, DIY repairs, energy-saving tips, navigating housing schemes) | Contract resources donated inc. time, materials, equipment, space etc (£) | £1.00 | | | £0.00 | | |
| A good start in life | NT4 | Employees recruited who are Not in Education Employment or Training (16-24 y.o.) | no. people FTE | £52,371.00 | | | £0.00 | | |
| A good start in life | SC3 | Signatory of Care Leavers Covenant | Y/N | Non-financial | | | Non-financial | | |
| A good start in life | NT8 | Support for students at local educational institutions | no. staff volunteering hours | £17.48 | | | £0.00 | | |

Contract managers will share the monitoring sheet with suppliers during kick-off meetings. The monitoring sheet will be populated with your Social Value commitments made in the bidding stage.

When completing the Social Value monitoring sheet, suppliers should ensure they:

1. Complete the information required in the 'Contract details' tab
2. Ensure the Social Value activities/initiatives included align with the commitments formalised as part of the council contract
3. Specify any delivered Social Value commitments in the 'Social Value Monitoring' tab, inputting data within the appropriate contract quarter depending on when the activity was delivered
4. Quantify all data in line with the units shown, ensuring supporting evidence is provided for each commitment reported
5. Refer to the 'Guidance' tab for more information on evidence requirements for each measure
6. Make quarterly updates and return the Social Value Monitoring Sheet to your contract manager via email in accordance with the requirements for submission of management information

Submitting data and evidence

Accurate and robust data provides the council with assurance that the Social Value activity has taken place.

Suppliers should refer to the 'evidence requirements' in the Social Value Monitoring Sheet for the relevant Social Value measures and ensure the information provided meets the criteria.

This information will be reviewed and verified by the council and clarification questions will be issued to the supplier where sufficient evidence has not been provided.

Suppliers delivering contracts valued over £1,000,000 are required to complete an 'Impact Survey' and 'Case Study' at the end of each year of the contract (or at the end of the contract if the term is shorter than a year). These tools will be used to highlight the successful delivery of Social Value activity on the contract and the impact on our residents. Templates are available through the council website.

Non-delivery

Where there are genuine and justifiable reasons for the non-delivery of a Social Value offer, suppliers should:



If the supplier is not able to deliver on its Social Value obligations as per the commitments in the contract or any of the alternative measures, the council reserves the right to apply remedies for the failure to deliver in whole or part of the Social Value commitments written in the contract.

Contract completion

Suppliers must ensure that the Social Value measures have been successfully achieved and provided all data and evidence to the council for the contract to reach completion. This includes the completion of impact surveys and case studies.

The council's two step approach to reporting will enable us to tell the complete story. Our measures enable the quantification of Social Value in financial terms, so that we can measure the additional positive benefits created for residents and communities through every public pound spent. The impact surveys and case studies will provide the supporting narrative to demonstrate the full impact of activities.

Contract extension

If a project is extended, officers will work with the supplier to agree additional Social Value commitments for this period.

Calculating your FTE

To calculate the full-time equivalents (FTE) for each employee, the following details are required:

1. Average full-time working hours for employees in a year (e.g. 35 hours per week * 46.4 working weeks in a year = 1624 full-time hours per year)
2. Total working hours for each employee in a year (e.g. Employee A: 16 hours * 46.4 working weeks in a year = 742.4 hours worked per year)

Then use the below calculation:

$$\frac{\text{Total working hours by employee in a year}}{\text{Full-time working hours per year}} = FTE$$

There are three measures within Southwark's Social Value Framework Methodology where the unit is FTE. These are: NT4, NT1, NT3.

For additional support

Contact the procurement officer, contract manager or email the Social Value team:
socialvalue@southwark.gov.uk