

Managing Social Value in Services and IT

**Contract Manager on-demand
webinar**

This is an information session for Contract Managers which sets out how social value is included in public contracts and practical advice on how the social value requirements can be monitored and managed to ensure they are delivered.

Learning Outcomes

- > Outline the **social value approaches** public bodies in Northern Ireland use in public tender competitions.
- > Explain how public bodies in Northern Ireland **score social value** in public tender competitions in accordance with [Procurement Policy Note \(PPN\) 01/21 \(Social Value in Procurement\)](#).
- > Detail how public bodies in Northern Ireland **monitor and manage the delivery of social value** requirements.

By the end of this session, you will be able to:

- Outline the social value approaches public bodies in Northern Ireland use in public tender competitions.
- Explain how public bodies in Northern Ireland score social value in public tender competitions in accordance with [Procurement Policy Note \(PPN\) 01/21 \(Social Value in Procurement\)](#).
- Detail how public bodies in Northern Ireland monitor and manage the delivery of social value requirements.

What is social value?

- > Social value refers to wider financial and non-financial impacts on the wellbeing of individuals, communities and the environment.
- > Social value derived from a public contract is the positive legacy we will create through its performance such as **a more diverse workforce, fewer single use plastics in the environment and more cohesive communities.**



Public procurement is an important source of expenditure in Northern Ireland, with central and local government spending upwards of £3 billion annually on supplies, services and construction works. This expenditure offers tremendous potential to contribute to the economic, environmental and social outcomes contained in the Executive's Programme for Government.

Social value refers to the wider financial and non-financial impacts on the wellbeing of individuals, communities and the environment.

The social value derived from a public contract is the positive legacy created through its performance such as a more diverse workforce, fewer single use plastics in the environment and more cohesive communities.

Think about when you buy a takeaway hot drink from a café. More and more of us are now conscious to bring a reusable cup with us. In doing so, we are saving money, reducing waste and reducing carbon emissions – that is Social Value.

Many of us are already making purchasing decisions in a way that delivers social value, and now it is time to bring this mindset into the workplace and

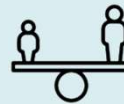
harness the potential of Northern Ireland's spending power.

Benefits



By including social value in procurement, we can:

- > Create job opportunities for people who face barriers to work
- > Invest in skills
- > Support Social Enterprises and new businesses
- > Support Voluntary and Community organisations
- > Promote equality, diversity and inclusion
- > Reduce our carbon footprint and promote biodiversity
- > Improve mental health and wellbeing

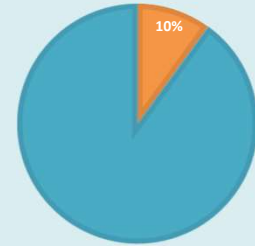


By including social value in procurement, Contracting Authorities and Suppliers can:

- Create job opportunities for people who face barriers to work
- Invest in skills
- Support Social Enterprises and new businesses
- Support Voluntary and Community organisations
- Promote equality, diversity and inclusion
- Reduce our carbon footprint and promote biodiversity
- Improve mental health and wellbeing

PPN 01/21 – Social Value in Procurement

- > Tenders must allocate **a minimum of 10%** of the total award criteria to social value.
- > This 10% minimum will apply to **services and IT contracts** above £500,000. It does not apply to supplies contracts.
- > Where appropriate, public bodies can also:
 - score for social value on contracts outside of these thresholds.
 - give greater weight to social value than the 10% minimum.



Procurement Policy Note 01/21 was approved by the Executive in December 2024 and has the status of government policy.

The PPN mandates that from 24 February 2025, public sector tenders must allocate a minimum of 10% of the award criteria to Social Value in services and IT contracts above £500,000 (inclusive of VAT). It is not currently mandatory to score social value in supplies contracts although some Contracting Authorities may opt to do this.

Where appropriate, public bodies can also:

- score for social value on contracts outside of these thresholds and/or
- give greater weight to social value than the 10% minimum.

Other requirements

- > Requirement to consider grant funding and reserving contracts
- > Considering ways of reducing consumption and including end-of-life requirements
- > Specifying minimum sustainable requirements
- > Policy will be reviewed in 2027

Contract Manager tip:
Review the contract documents carefully for any social value requirements that have been included in the specification and other areas of the contract and ensure any commitments are delivered.

PPN 01/21 states that Departments must ensure opportunities for social value are maximised for all contracts. For example, through:

- Considering if grant funding or reserving the contract would be more appropriate to achieve the best outcomes and public benefit.
- Considering ways of reducing consumption and end-of-life requirements in order to reduce carbon emissions and promote a circular economy.
- Specifying the minimum sustainable requirements relevant to the work, supply or service being purchased in the specification to deliver the intended outcomes (i.e., by including relevant green public procurement criteria).

You should check your contract documents carefully for any social value requirements that have been included in the specification and other areas of the contract and ensure any commitments are delivered.

Scoring Social Value

> Social value will be scored based on 4 themes:



> Each theme is broken down into a set of indicators.

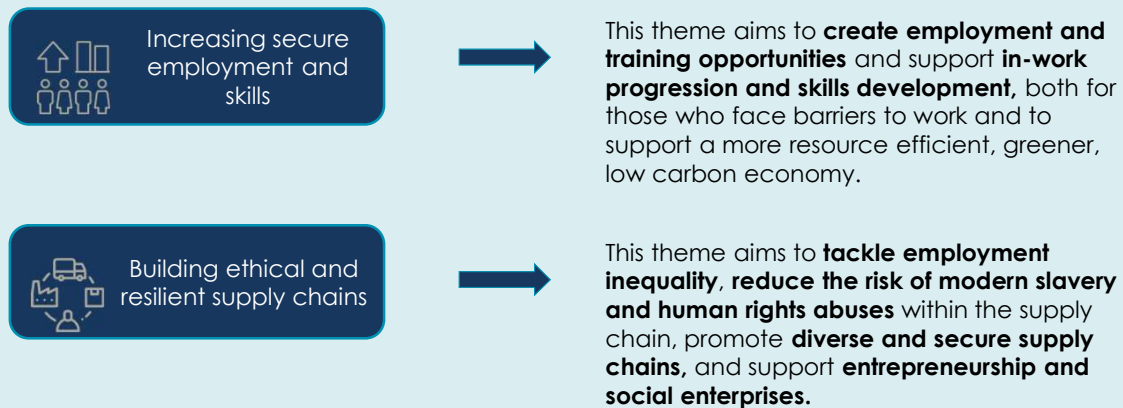
PPN 01/21 provides a framework of social value themes and indicators. A common framework enables Contracting Authorities and Suppliers to develop a shared understanding of the social value requirements of public contracts and how they will be scored.

There are 4 themes:

- Increasing secure employment and skills
- Building ethical and resilient supply chains
- Delivering climate action and
- Promoting wellbeing

Each theme is broken down into a set of indicators.

Social Value themes



Each theme aims to address risks and maximise opportunities to deliver social value in relation to the area in question.

Increasing secure employment and skills aims to create employment and training opportunities and support in-work progression and skills development, both for those who face barriers to work and to support a more resource efficient, greener, low carbon economy.

Building ethical and resilient supply chains aims to tackle employment inequality, reduce the risk of modern slavery and human rights abuses within the supply chain, promote diverse and secure supply chains, and support entrepreneurship and social enterprises..

Social Value themes



Delivering climate action



This theme aims to support **climate adaptation and mitigation** measures, promote **biodiversity and resilient ecosystems**, stimulate the **circular economy** and work towards net zero by **minimising carbon emissions**.



Promoting wellbeing




This theme aims to support **wellbeing**, improve **equality, diversity and inclusion**, and promote **community cohesion**.

Delivering climate action aims to support climate adaptation and mitigation measures, promote biodiversity and resilient ecosystems, stimulate the circular economy and work towards net zero by minimising carbon emissions.

Promoting wellbeing aims to support wellbeing, improve equality, diversity and inclusion, and promote community cohesion.

Themes and Indicators



Building ethical and resilient supply chains

2.1 Demonstrate action to promote collaboration and a fair and responsible approach to working throughout the supply chain

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.

2.3 Maximise security of supply, for example by minimising proximity of supply chains to point of delivery

2.4 Create a diverse supply chain to deliver the contract including new businesses and entrepreneurs, start-ups, SMEs and VCSEs.

Each theme is broken down into a set of indicators. Contracting Authorities may select indicators from one or multiple themes for inclusion in the social value requirements of the contract, in order the Authority's strategic priorities.

Here we have the 4 indicators that relate to the building ethical and resilient supply chains theme:

- 2.1 Demonstrate action to promote collaboration and a fair and responsible approach to working throughout the supply chain
- 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.
- 2.3 Maximise security of supply, for example by minimising proximity of supply chains to point of delivery
- 2.4 Create a diverse supply chain to deliver the contract including new businesses and entrepreneurs, start-ups, SMEs and VCSEs.

You can download a list of all the Social Value Themes and Indicators from the Contract Manager section of the Social Value Unit website.

Social Value Approaches

Contracting Authorities will score for social value based on the 4 themes. A common framework enables contracting authorities and suppliers to develop a shared understanding of what social value requirements will be taken into account and how they will be scored.

Approaches

The social value model sets out **three options for scoring social value** depending on the size and nature of the contract:

1. Social value points;
2. Fixed social value indicator; and
3. Hybrid approach

All approaches are based on the 4 social value themes and both evaluate Tenderers' qualitative responses to the award criterion.

Contract Manager tip:
Review the social value requirements which have been included in the Invitation to Tender and supporting contract papers (including the Supplier's response to the social value award question).

The social value model sets out three options for scoring social value depending on the size and nature of the contract:

- social value points;
- Fixed social value indicator; and,
- A hybrid approach.

All approaches are based on the 4 social value themes and both evaluate Tenderers' qualitative responses to the award criterion. Therefore the response is evaluated based on a methodology setting out how the tenderer will deliver the required social value against the particular themes/indicators set out.

To establish which approach has been used to score the social value of a particular contract, Contract Managers should review the social value requirements which have been included in the Invitation to Tender and supporting contract papers (including the Supplier's response to the social value award question).

We will now look at how the social value points approach works.

Social Value Points

- > **Default position** for Services and IT contracts over £250k per annum per supplier
- > Social value points ensure social value outcomes are delivered in a **measurable, proportionate and flexible** manner.
- > Social value points tenders are assessed and given a score based on the tenderer's methodology for delivering the minimum social value points for that contract

The social value points approach is the default position for all Services and IT contracts with a value of over £250,000 per annum.

Using social value points ensures that social value outcomes are delivered in a measurable, proportionate and flexible way.

Social value points tenders are assessed and given a score based on the tenderer's methodology for delivering the minimum social value points for that contract.

Social Value Points

- > Requires the Supplier to deliver **a minimum of 100 social value points per £1m** of contract value (and pro-rata).
- > The Contracting Authority **selects the Social Value Theme(s)/Indicator(s)** which are relevant to the contract.
- > Each Social Value Indicator from PPN 01/21 is broken down into subsequent initiatives. **Each initiative has been allocated a number of social value points.**
- > The Supplier will have **flexibility to choose** which of those initiatives they deliver.

When a tender uses the social value points approach:

- the Supplier is required to deliver a minimum of 100 social value points per £1m of contract value (and pro-rata).
- The Contracting Authority selects the Social Value Theme(s)/Indicator(s) which are relevant to the contract.
- Each Social Value Indicator from PPN 01/21 is broken down into subsequent initiatives. Each initiative has been allocated a number of social value points.
- The Supplier will have flexibility to choose which of those initiatives they deliver.

Theme 1: Secure Employment and Skills

Social Value Indicator	Social Value Initiative	Unit of Measure	Beneficiaries	Social Value Points
Indicator 1.2 Support educational attainment relevant to the contract, including training schemes that address skill gaps and result in recognised qualifications	Work placements	4 weeks FTE	people who are considered to be disadvantaged in the labour market or at risk of social exclusion	20
			people who meet the Contracting Authority's priority groups	30
	Skills development and educational attainment	8 hours of training or support	people who are considered to be disadvantaged in the labour market or at risk of social exclusion	10
			people who meet the Contracting Authority's priority groups	15
			people who are considered to be at risk of digital exclusion	10
Digital skills development and educational attainment	8 hours of training or support	people who are considered to be at risk of digital exclusion	10	
		people who meet the Contracting Authority's priority groups	15	
In-work progression and skills development	1 Strategy	existing staff who are underrepresented in the contract's workforce	30	

In this example, the Contracting Authority has selected Indicator 1.2 from the secure employment and skills theme. You can see the Indicator on the left hand side, which is then broken down into 4 initiatives:

- Work placements
- Skills development and educational attainment (for services contracts)
- Digital skills development and educational attainment (for IT contracts) and
- In-work progression and skills development

The Supplier has flexibility to choose which social value 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.

In the procurement documents, the Contracting Authority will set out an indicative minimum number of points that the Supplier is required to deliver based on the estimated contract value at the time of procurement. For example, if this was for a £1m contract the minimum number of social value points required would be 100. A tenderer may choose to deliver those 100 points through 20 weeks of work placements, or 80 hours of skills development and educational attainment, or a combination of both perhaps.

The Contracting Authority may set minimum mandatory targets for specific social value indicators within the Social Value Schedule, which the Supplier must deliver as part of the overall social value requirements on the Contract. For example, they could stipulate that 20% of the social value points must be delivered through work placements.

Social Value Delivery Plan

Approach for the delivery of the social value requirements set out in Schedule 4

The Contractor must deliver a minimum value of 100 Social Value points for every £1 million (and pro-rata) in invoiced value, capped at an averaged contract value of £3 million per annum.

Estimated value of contract (in millions)	£	45.0	million
Total Social Value points to be delivered		2400	Social Value points
Term of contract (in years)		8	years

The social value initiatives which are eligible for inclusion on this contract and their associated points are detailed on the previous tab of this spreadsheet 'Social Value Initiatives'.

Bidders must complete the table below to demonstrate how the social value requirement will be delivered. This will be submitted with the tender.

Social value initiative	Unit of Measurement	Planned Delivery (to be completed by Bidder)	Points Value
Paid employment for people who face barriers to employment or are from deprived areas	Number of FTE person weeks which will be delivered throughout this contract	832	1200
Unwaged work placements for people who face barriers to employment or are from deprived areas	Number of FTE person weeks which will be delivered throughout this contract		0
Digital skills development, cyber security awareness training and educational attainment for people who are at risk of digital exclusion	Number of hours which will be delivered throughout this contract	400	500
In-work Progression and Skills Development Strategy	Strategy will be submitted in relation to work carried out on this contract	yes	30
In-work Progression and Skills Development Strategy - annual updates	Number of annual updates which will be submitted throughout the duration of the contract	7	70
Inclusion of Social Enterprises in the contract's supply chain	Use of at least one social enterprise in the supply chain (in relation to work carried out on this contract)		0

When responding to a tender that uses social value points, tenderers will be required to submit two things. The first is a Social Value Delivery Plan setting out how they will deliver the specified minimum number of points and the second is a written methodology detailing how they will action the initiatives they have set out in the delivery plan.

Tenderers do not have to deliver against every social value initiative selected by the Contracting Authority and included in the Social Value Delivery Plan. The tenderer must ensure that the initiatives they do plan to action deliver will the minimum number of social value points. In this example, you can see the tenderer is going to deliver 832 weeks of paid employment, 400 hours of digital skills development and an in-work progression and skills development strategy with annual updates. They do not intend to deliver work placements or include a social enterprise in the supply chain. The minimum indicative number of points will be proportionate to the contract value.

Social Value Points – methodology

- > **timescales** for delivery of the social value requirements;
- > the **resources**, both internal and external, that the tenderer will use to plan and deliver the social value requirements;
- > the **activities** the tenderer will undertake to deliver the social value initiatives 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);
- > confirmation that all activities included in your response are **forward looking activities that are directly related to this contract**; and,
- > how the tenderer will **monitor and report** on the delivery of the social value requirements and **address any performance issues**

So the Social Value Delivery Plan we have just looked at is part one of the tenderer's response and the methodology is the second required component. Through the methodology, the tenderer details how they will deliver the initiatives they have set out in the delivery plan.

The methodology will evaluate a number of areas, for example:

- timescales for delivery of the social value requirements;
- the resources, both internal and external, that the tenderer will use to plan and deliver the social value requirements;
- the activities the tenderer will undertake to deliver the social value initiatives 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);
- confirmation that all activities included in the response are forward looking activities that are directly related to this contract; and,
- how the tenderer will monitor and report on the delivery of the social value requirements and address any performance issues

Social Value Points

Benefits

- > Qualitative assessment does not disadvantage VCSEs and microbusinesses
- > Ensures proportionality - targets are based on invoiced value
- > Flexibility for the Supplier
- > Progress reported via the Social Value monitoring system
- > Quantifiable social value outcomes support effective contract management

The benefits of the social value points approach are that:

- the qualitative assessment does not disadvantage VCSEs and microbusinesses
- it ensures proportionality as targets are based on invoiced value
- it offers flexibility for the Supplier
- Progress is reported via the online Social Value monitoring system, making it easy to monitor for both supplier and contracting authority
- It requires quantifiable social value outcomes which supports effective contract management

Fixed social value indicator

The fixed social value indicator approach does not focus on social value points.

The contracting authority selects the relevant social value theme(s) and appropriate indicator(s). The Contracting Authority will include an evaluation question focussed on achieving the indicator(s) under the selected theme(s).

The fixed social value indicator approach may be used when:

- > The contract is below £250,000 per annum per supplier
- > The contract is high value but over a short duration, e.g., 6 months.
- > There is an overriding social value theme/indicator that the Contracting Authority wish to address.

As mentioned earlier, the social value model sets out 3 options for scoring social value depending on the size and nature of the contract:

We will now look at the fixed social value indicator approach.

This approach does not focus on social value points. Instead, the contracting authority selects the relevant social value theme(s) and appropriate indicator(s). The Contracting Authority will include an evaluation question focussed on achieving the indicator(s) under the selected theme(s).

The fixed social value indicator approach may be used when:

- The contract is below £250,000 per annum per supplier
- The contract is high value but over a short duration, e.g., 6 months.
- There is an overriding social value theme/indicator that the Contracting Authority wish to address.

Fixed social value indicator

- > The evaluation panel will assess and give a score based on how well the tenderer's methodology addresses the selected Social Value Theme(s) and Indicator(s).
- > A minimum weighting of 10% of the overall award criteria will be applied

The evaluation panel will assess and give a score based on how well the tenderer's methodology addresses the selected Social Value Theme(s) and Indicator(s).

A minimum weighting of 10% of the overall award criteria will be applied.

Fixed social value indicator - methodology

The methodology will evaluate a number of areas including:

- > The **activities** the tenderer will undertake and **metrics** for each activity;
- > **timescales** for delivery of the social value requirements;
- > the **resources**, both internal and external, that the tenderer will use to plan and deliver the social value requirements;
- > the **activities** the tenderer will undertake to deliver the social value activities including how they will **engage with key stakeholders** (e.g. social value beneficiaries, organisations within the voluntary, community and social enterprise sector);
- > confirmation that all activities included in your response are **forward looking activities that are directly related to this contract**; and,
- > how the tenderer will **monitor and report** on the delivery of the social value requirements and **address any performance issues**

In their methodology response, tenderers may be asked to set out:

- The activities the tenderer will undertake and metrics for each activity;
- timescales for delivery of the social value requirements;
- the resources, both internal and external, that the tenderer will use to plan and deliver the social value requirements;
- the activities the tenderer will undertake to deliver the social value activities including how they will engage with key stakeholders (e.g. social value beneficiaries, organisations within the voluntary, community and social enterprise sector);
- confirmation that all activities included in your response are forward looking activities that are directly related to this contract; ; and,
- how the tenderer will monitor and report on the delivery of the social value requirements and address any performance issues.

Hybrid approach

When warranted by the characteristics of the contract, there is a third option for scoring social value – a hybrid approach.

This approach involves:

- 1) Including a requirement to **deliver Social Value points as contract performance clauses** in the Conditions of Contract; and,
- 2) **Scoring the tenderers' responses to how they will address a fixed Social Value indicator(s)**, selected in response to the particular social value risks and/or opportunities of the contract.

When warranted by the characteristics of the contract, there is a third option for scoring social value – a hybrid approach.

Using this approach, the contracting authority selects the most relevant social value theme and indicator and includes an evaluation question focussed on achieving that indicator(s) to include in the award criteria. They then also include a requirement in the Conditions of Contract to deliver social value points.

This approach works well when the Contracting Authority has a particular social value indicator that they want to highlight as important to them, and they want to encourage innovation in relation to that area of social value, as well as ensure delivery of a range of social value initiatives via the points based approach.

Managing Social

Social value requirements must be delivered in line with contractual commitments, and must be adequately managed to ensure value for money.

If the social value requirements are not delivered, you could face:

Contractual/legal issues

Budgetary issues

Reputational damage

Contract Manager tip:

At the contract initiation meeting, confirm the contract's social value requirements and how the requirements will be monitored with the Supplier.

Contract Manager tip:

PPN 01/21 sets out a requirement that a KPI should be developed for social value. You should ensure that performance against this KPI is managed.

Good contract management ensures that all parties fully meet the requirements specified in the terms and conditions of the contract, including in relation to social value.

Social Value will be managed in the same way as any other aspect of the contract. Social value requirements must be delivered in line with contractual commitments, and they must provide value for money. At the contract initiation meeting, you should confirm the contract's social value requirements and how the requirements will be monitored with the Supplier.

Contracting Authorities and Suppliers could face contractual and budgetary issues as well as reputational damage, if the social value requirements of a contract are not delivered. Reputational damage can have long lasting effects on the supplier and contracting authority. PPN 01/21 sets out a requirement that a KPI should be developed for social value. You should ensure that performance against this KPI is managed.

Monitoring social

- > Monitored using web-based social value monitoring system
- > The Unit will set up the contract in the Social Value monitoring system, pre-populating the Social Value targets included in the contract.
- > The Unit will issue the Supplier with login details and guidance on how to add information relating to the delivery of their targets.
- > A report will be sent from the system at regular intervals to both the Supplier and Client Project Managers.

Contract Manager tip:

Inform the Social Value Unit at SIB that a contract including social value requirements has been awarded-
socialvalueni@sibni.org

The Social Value monitoring system is a web-based system.

When a contract including social value requirements is awarded, you must inform the Social Value Unit at SIB via socialvalueni@sibni.org. You will also need to inform the Unit if the contract is delayed and when the contract has completed.

The Unit will set up the contract in the Social Value Monitoring Portal, prepopulating the Social Value Points targets included on the contract. The Unit will issue the Supplier with login details and guidance on how to add information relating to the delivery of their targets.

A report will be sent from the system at regular intervals to both the Supplier and Client Project Managers.

Social value monitoring system

When a contract is awarded, Suppliers will:

- > Receive login details and guidance on how to add information relating to the delivery of their targets;
- > Receive a reminder to update the report (however, suppliers can log in at any time);
- > Record their progress to date against each indicator;
- > Be emailed a report at regular intervals, along with the Client Project Manager.



Contract Manager tip:

Assess each social value monitoring report to determine if the Supplier is on track to deliver their targets.

When a contract is awarded, Suppliers will:

- Receive login details and guidance on how to add information relating to the delivery of their targets;
- Receive a reminder to update the report (however, suppliers can log in at any time);
- Record their progress to date against each indicator - There is a notes section which Contract Managers should encouraged Suppliers to use to record any efforts that they have made to fulfil their targets;
- Be emailed a report at regular intervals, along with the Client Project Manager.

Contract Managers should assess each social value monitoring report to determine if the Supplier is on track to deliver their targets. We will look at a worked example of how to do this now.

Assessing social value monitoring reports

Contract: **IT System and Support Desk Service**

Value: **£45m**

Duration: **8 years**

No. of social value points required across the lifetime of the contract: **2400**

It is the start of the 5th year of the 8 year contract and you are preparing for the contract review meeting.

Documents to review:

- > Social Value Delivery Plan the Supplier submitted as part of the tender
- > Most recent Social Value Monitoring Report

Contract Manager tip:

Include social value as a standard agenda item at contract review meetings

You are the contract manager of a £45m contract, with a duration of 8 years. The total number of Social Value points that are required to be delivered across the lifetime of the contract is 2400. It is the start of the 5th year of the 8 year contract and you are preparing for the contract review meeting. You have included social value as a standard agenda item at all contract review meetings.

The documents you need review are:

- The Social Value Delivery Plan the Supplier submitted as part of the tender
- The most recent Social Value Monitoring Report that you have received by email from the monitoring system

Supplier's Social value delivery plan

Bidders must complete the table below to demonstrate how the social value requirement will be delivered.
This will be submitted with the tender.

Social value initiative	Unit of Measurement	Planned Delivery [to be completed by Bidder]	Points Value
Paid employment for people who face barriers to employment or are from deprived areas	Number of FTE person weeks which will be delivered throughout this contract	260	750
Paid employment for people from the Client's priority group	Number of FTE person weeks which will be delivered throughout this contract	78	270
Unwaged work placements for people who face barriers to employment or are from deprived areas	Number of FTE person weeks which will be delivered throughout this contract	25	250
Unwaged work placements for people from the Client's priority group	Number of FTE person weeks which will be delivered throughout this contract	30	450
Digital skills development, cyber security awareness training and educational attainment for people who are at risk of digital exclusion	Number of hours which will be delivered throughout this contract		0
Digital skills development, cyber security awareness training and educational attainment for people from the Client's priority group	Number of hours which will be delivered throughout this contract	363	680.625

As you can see from the Social Value Delivery Plan, the Supplier committed to delivering the following social value initiatives across the lifetime of the contract:

- 260 person weeks of employment for people who face barriers to employment
- 78 person weeks of employment for people with a disability
- 25 weeks of work experience placements for people who face barriers to employment
- 30 weeks of work experience placements for people with a disability
- 363 hours of digital skills development and educational attainment for people with a disability

Social value report

Social Value Report for:

IT system and support desk service



The Strategic Investment Board

Summary

Contract Type: IT
 Points Target: 2400
 Points Delivered to Date: 1175.5
 Target Delivered (%): 49%
 Last Updated: 15/12/2021

Eligible Social Value Initiatives

Paid employment
 Work placements
 Digital skills development and educational attainment

Results:

Paid Employment for people who face barriers to employment

Details	Week(s) Target	Week(s) Delivered
3 FT and 2 PT employees	260	130
		Points: 375

Paid Employment for people with a disability

Details	Week(s) Target	Week(s) Delivered
1 PT employee	78	22.5
		Points: 78

Work experience for people who face barriers to employment

Details	Week(s) Target	Week(s) Delivered
8 x 2 week placements delivered to date, 9th underway	25	17.5
		Points: 175

Work experience for people with a disability

Details	Week(s) Target	Week(s) Delivered
8 x 2 week placements delivered to date, 9th underway	30	11
		Points: 165

Digital skills development and educational attainment for people with a disability

Details	Hours Target	Hours Delivered
8 x 2 week placements delivered to date, 9th underway	380	204
		Points: 382.5


From the Social Value monitoring reports, you can see that the Supplier has delivered 1175.5 Social Value points to date through those initiatives:

- They've delivered 130 weeks of Paid employment for people who face barriers to employment, earning 375 points
- 22.5 week of Paid employment for people with a disability, earning 78 points
- 17.5 weeks of Work experience for people who face barriers to employment earning 175 points
- 11 weeks of Work experience for people with a disability earning 165 points
- And 204 hours of Digital skills development and educational attainment for people with a disability – earning 382.5 points

Assessing the social value delivered to date

1. Calculate the % of social value points delivered to date:

1175.5 points delivered
2400 Social Value points required } 49% of total Social Value Points delivered to date

Social Value Report for:	
IT system and support desk service	
	
Summary	
Contract Type:	IT
Points Target:	2400
Points Delivered to Date:	1175.5
Target Delivered (%):	49%
Last Updated:	15/12/2021
Flexible Social Value Initiatives	

Your first step is to establish the overall social value requirements delivered to date. You can see from the most recent monitoring report that 49% of the total Social Value Points have been delivered to date - 1175.5 points delivered of the required 2400 Social Value points. From this preliminary analysis, the Supplier is doing well and seems to be on track for delivering the overall Social Value requirement of the contract in the 8 year timeframe.

Assessing the social value delivered to date

2. Analyse each social value initiative's delivery to date:

Social Value Initiative	From Monitoring reports		From Social Value Delivery Plan		% delivered to date
	Units delivered	Points earned	Target units	Target points	
Paid employment for people who face barriers to employment	130 weeks	375	260 weeks	750	50%
Paid employment for people with a disability	22.5 weeks	78	78 weeks	270	29%
Work experience for people who face barriers to employment	17.5 weeks	175	25 weeks	250	70%
Work experience for people with a disability	11 weeks	165	30 weeks	450	37%
Digital skills development and educational attainment for people with a disability	204 hours	382.5	363 hours	712.5	56%

Your next step, is to review each social value initiative's delivery to date. You consult the Supplier's Social Value Delivery Plan, which they submitted at the contract's bid stage, to understand in more detail if the Supplier is on track to deliver the specific social value initiatives they set out to explain how they would deliver the specified minimum number of points with the tender.

In this table, you can see in the red columns what the Supplier has delivered, in the orange columns is what the Supplier committed to deliver and in the final blue column is the % of each initiative that has been delivered to date.

At this stage of the contract, when 4 out of 8 years have passed, you would expect the supplier to have delivered 50% of each social value initiative included in the Social Value Delivery Plan. From this more detailed analysis, you can see that the Supplier is on track for 3 out of 5 initiatives, but is at risk of falling behind with the work experience and paid employment for people with a disability.

Potential actions

- > Ask the Supplier
- > Request an updated Social Value Delivery Plan
- > Make suggestions
- > Highlight potential brokers

Contract Manager tip:

Discuss any risks of under achievement with the Supplier and put a plan in place to mitigate the risk.

Contract Managers should discuss any risks of under achievement with the Supplier and put a plan in place to mitigate the risk. Here are some actions to take at the contract review meeting to ensure delivery of the contract requirements:

- Ask the Supplier how they intend to ensure full delivery of each social value initiative across the lifetime of the contract.
- Request an updated Social Value Delivery Plan to show how they plan to ensure delivery
- Suggest that, as they seem to be delivering well against the digital skills development initiative, they could use the contacts and systems involved in delivering that element to identify and encourage more work placement participants who have a disability, which may lead to increased applicants for paid employment on the contract.
- Highlight potential brokers who work with people with a disability who may be able to nominate participants/applicants for the work placement or paid employment opportunities. The 'Find a Broker' page in the Suppliers' section of 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 social value initiative, priority group, location and industry to help Contractors find a suitable organisation to help them meet their particular Social Value requirements.

Summary

- > A **minimum of 10% of total award criteria will be allocated to social value** in all IT and Services contracts above £500,000.
- > The social value approaches are based on the **4 social value themes**
- > **Monitoring progress** of social value delivered on a contract helps to keep to agreed targets and ensure value for money.
- > **Further resources** are available on the Contract Manager section of the Social Value Unit website

A minimum of 10% of total award criteria will be allocated to social value in all IT and Services contracts above the threshold where the Procurement Regulations apply.

The social value approaches are based on the 4 social value themes

Monitoring progress of social value delivered on a contract helps to keep to agreed targets and ensure value for money.

Further resources are available on the Contract Manager section of the Social Value Unit website, where you can also download a written version of the guidance provided in this session.

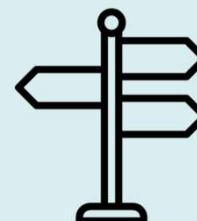
What you can do next

Information & Training

- > Sign up to our newsletter
- > Complete the Scoring Social Value e-learning course
- > Sign up to attend more detailed virtual training

Apply your knowledge

- > [Read the guidance](#) on how the model works in detail
- > Embed the contract management tips into your existing practices and discuss these with your team



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