

## **Delivering Social Value in Northern Ireland**

**Information session for Suppliers –  
Construction & Construction Related  
Professional Services**

This is an information session for suppliers of the public sector and will cover how social value is included throughout the procurement of relevant Construction and Construction related professional services contracts, as well as how it is scored.

## Learning Outcomes

- > Outline how public bodies in Northern Ireland **embed social value** in their procurement
- > 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 the delivery of social value** requirements.
- > Understand how to **identify relevant social value brokers** to help you deliver social value requirements

By the end of this session, you will be able to:  
Outline how public bodies in Northern Ireland embed social value in their procurement

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 the delivery of social value requirements.

Understand how to identify relevant social value brokers to help you deliver 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 continue to bring this mindset into the

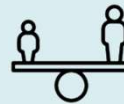
workplace and harness the potential of Northern Ireland's spending power.

## Benefits of including social value



### By including social value in procurement, we can:

- > Invest in skills and employability
- > Support social enterprises and micro enterprises
- > Support voluntary and community organisations
- > Promote equality, diversity and inclusion
- > Build ethical, diverse and resilient supply chains
- > Reduce our carbon footprint and promote biodiversity
- > Improve mental health and wellbeing



By including social value in procurement, the public, private and VCSE sectors can work together to:

- > Invest in skills development and employability, to support a more resource efficient, greener and low carbon economy
- > Support social enterprises and micro enterprises
- > Support voluntary and community organisations
- > Promote equality, diversity and inclusion
- > Build ethical, diverse and resilient supply chains
- > Reduce our carbon footprint and promote biodiversity
- > Improve mental health and wellbeing

## PPN 01/21 – Social Value in Procurement

- > From 24 February 2025, tenders must allocate a **minimum of 10% of the award criteria to Social Value**
- > Applies to works contracts above the UK Procurement Threshold and contracts for services above £500,000 (inclusive of VAT).
  - For Construction contracts, the threshold is £5,372,609\*

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.

*\*figures correct as at January 2025.*



Procurement Policy Note 01/21 was revised and 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 works contracts above the UK Procurement Threshold and in services contracts above £500,000 (inclusive of VAT). The current threshold for Construction works contracts £5,372,609.

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
- > Social licence workstream for major capital or infrastructure projects
- > Policy will be reviewed in 2027

### Supplier 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.

The PPN also states that it is now a requirement to consider if grant funding would be a more appropriate way of delivering the service OR if the contract could be reserved. Reserving a contract means that only certain types of suppliers can bid for the contract. PPN 01/21 focuses on reserving a contract for 'supported employment providers', which are organisations that employ or provide employment related support to disabled or disadvantaged people.

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

- 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).
- Major capital or infrastructure projects which impact on communities must have a plan for effective community consultation before, during and following the delivery of the projects (i.e. a social licence workstream). Major is defined as a project over £20m which is

categorised as High Risk for the purposes of the Gateway Review Process.

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.



## Social Value Themes and Indicators

Having a set of themes helps contracting authorities and suppliers to have a shared understanding of social value requirements.



An indicator is the substance behind each theme that outlines in more detail how the theme can be addressed. There are multiple indicators for each theme.

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

There are 4 themes:

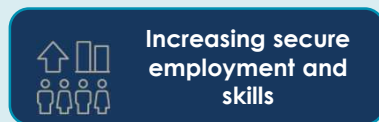
- Increasing secure employment and skills
- Building ethical and resilient supply chains
- Delivering climate action and
- Promoting wellbeing

Each theme is broken down into a set of indicators.

Contracting Authorities may select one or multiple themes for inclusion in the social value requirements of the contract, in order to reflect the Authority's strategic priorities.

We will now look at each theme in a little more detail.

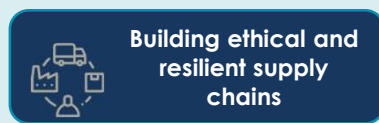
## Social Value themes



**Increasing secure employment and skills**



This theme 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**



This theme 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**.

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

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**.



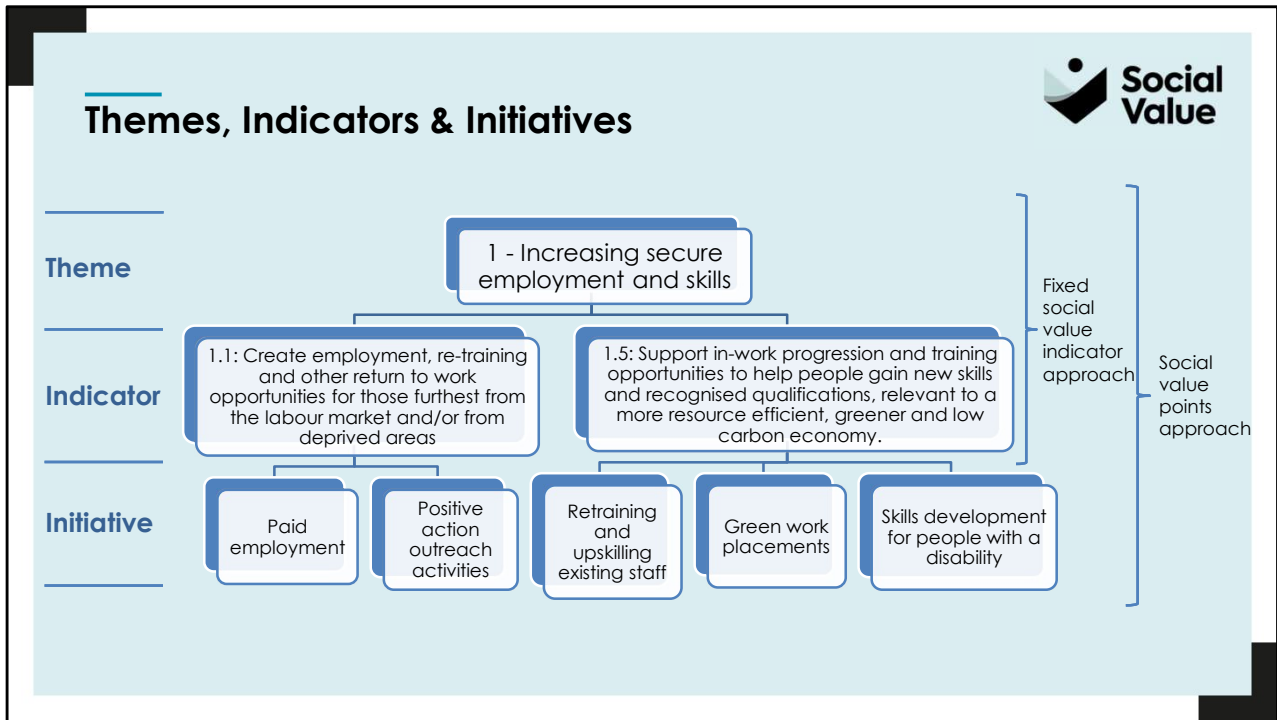
### Promoting wellbeing



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.



Each theme is broken down into indicators – here you can see theme 1 – increasing secure employment and skills.

Indicators outline in more detail how the theme can be addressed. There are 8 indicators under theme 1, but we've only pulled out indicator 1.1 and 1.5 to illustrate how themes and indicators work on this slide.

The Social value Points approach and the fixed social value indicator approach all use the same themes and indicators.

When the social value points approach is used, each indicator is aligned to Social Value Initiatives, which are the practical things that a contractor can deliver in order to achieve social value points on a contract. You can see a selection of initiatives that fall under theme 1 at the bottom of the slide. This is how it works across all 4 themes.

If you would like to look at all of the themes, indicators and initiatives in more detail, you can download a Social Value Delivery Plan from the Procurement section of our website.

## Example Initiatives

- Employment and work experience opportunities for people disadvantaged in the labour market
- Including social and micro enterprises in the supply chain
- Pro-bono professional advice to VCSE organisations or micro enterprises
- Offering expertise, labour or materials to VCSE organisations
- Environmental protection and improvement initiatives such as biodiversity protection
- Supporting the health and wellbeing of the contract workforce and the communities impacted by the contract



Here is a list of some of those initiatives. They are always linked to the subject matter of the specific contract so the contracting authority will select the relevant initiatives based on the type of contract. So, for example, in a Design contract the supplier may choose to deliver Pro Bono professional advice to a VCSE organisation related to their specialism. For a construction supplier that advice will be in a different area or they may choose to donate construction skills or equipment instead.

Initiatives can also be tailored to specific priority groups – that is groups of people that the Contracting Authority has a strategic responsibility for or that are service users of the contract for example. So the Contracting Authority may include, for example, people with a disability or care leavers as a priority group to encourage the supplier to deliver, for example, employment, work experience or skills development initiatives to those people.

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## Thinking Social

## Preliminary market engagement

**Suppliers should attend supplier engagement events and respond to preliminary market engagement questions.**

**You can communicate, highlight or give feedback on:**

- > the market capacity and capabilities
- > the social value risks and opportunities associated with the service or products being procured
- > how the market could enhance and maximise opportunities to add social value
- > the nature, cost and availability of current market solutions, including climate friendly or innovative solutions



Preliminary market engagement can help Contracting Authorities identify opportunities to maximise social value outcomes for each procurement competition. Suppliers should attend supplier engagement events and respond to preliminary market engagement questionnaires

By contributing to a Contracting Authority's pre-procurement engagement, Suppliers can communicate, highlight or give feedback on:

- the market capacity and capabilities
- the social value risks and opportunities associated with the service or products being procured
- how the market could enhance and maximise opportunities to add social value
- the nature, cost and availability of current market solutions, including climate friendly or innovative solutions

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**Buying Social – award criteria**



## Approaches

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

1. Social value points; and
2. Fixed social value indicator.

**Both approaches are based on the 4 social value themes set out in the policy and both evaluate Tenderers' qualitative responses to the award criterion.**

The social value guidance for construction contracts sets out two options for scoring social value depending on the size and nature of the contract. These are:

- social value points; and
- fixed social value indicator.

Both 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.

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**Social Value Points in Construction &  
Construction Related Professional  
Services**

First, we will look at the social value points approach in construction and construction related professional services contracts.

## Social Value Points

- > **Default position** for all construction and construction- related professional services contracts
- > 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 construction and construction- related professional services contracts

Using social value points ensures that social value outcomes are delivering in a measureable, 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).
- > 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.
- > **HOWEVER:** The Contracting Authority can use several ways to ensure that the contract delivers social value that helps them to achieve Departmental priorities.
- > Tenders evaluated through a **qualitative assessment of the tenderer's methodology** for delivering the required number of Social Value points, through the initiatives selected by the Supplier (not the Mandatory Requirements).

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).
- 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.
- **HOWEVER:** The Contracting Authority can use several ways to ensure that the contract delivers social value that helps them to achieve Departmental priorities. – we will look at some examples of how this is done.
- Tenders evaluated through a qualitative assessment of the tenderer's methodology for delivering the required number of Social Value points, through the initiatives selected (not the Mandatory Requirements).

## Theme 1: Secure Employment and Skills

Social Value Indicator	Social Value Initiative	Unit of Measure	Beneficiaries	Social Value Points
<b>Indicator 1.1</b> Create employment, retraining and other return to work opportunities for those furthest from the labour market	Paid employment	52 person weeks FTE (Build)	people who face barriers to employment	75
			people who meet the Contracting Authority's priority groups	90
	<b>Indicator 1.2</b> 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
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	
<b>Indicator 1.4</b> Support in-work progression and educational attainment in the workforce, including training schemes that address skills gaps and result in recognized qualifications, to help people to move into higher paid work by developing new skills	In-work progression and skills development	1 Strategy	existing staff who are underrepresented in the contract's workforce	M
		Annual updates to strategy		M

In this example, you can see Indicators from Theme 1: Increasing secure employment and skills on the left hand side, which are then broken down into 4 initiatives:

- Paid employment
- Work placements
- Skills development and educational attainment
- In-work progression and skills development

The Supplier has flexibility to choose which social value initiatives with social value points they deliver against, giving them the benefit of aligning the requirements of the Contracting Authority with their own business models or solutions. The Supplier must deliver the mandatory requirement of an in-work progression and skills development strategy with annual updates.

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 £6m contract the minimum number of social value points required would be 600. A tenderer may choose to deliver those 600 points through 416 weeks of paid employment, 40 weeks of work placements,

or 80 hours of skills development and educational attainment, or a combination of all three.

The Contracting Authority may set additional 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.

## Tailoring Initiatives

The Contracting Authority may choose to refine how social value is on the contract to support progress against Departmental strategic priorities.

They may do this via:

- > Priority groups
- > Priority initiatives/minimum requirements
- > Setting maximum requirements
- > Ringfencing points



A contracting authority may choose to refine the Social Value Points approach and influence how the social value is delivered through the contract, in order to support progress against Departmental strategic priorities. These requirements will be set out clearly within the procurement documents.

Incorporating these options into the social value requirements of the contract allows the Contracting Authority to:

- Incentivise suppliers to work with their priority groups, for example, young people or people with a disability.
- Ensure any social value initiatives the Authority wants to be delivered are set as priority initiatives or minimum requirements.
- Set a maximum delivery level for certain social value initiatives if the Authority wants to cap the number of points that can be delivered through that initiative.
- *[In regards to works contracts only]* Ringfence a certain value of social value points to be allocated to the delivery of a community based project post contract award.

If the procurement includes any of these options, the Contracting Authority will ensure the requirements are set out clearly within the procurement documents.

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## Fixed Social Value Indicator approach

As mentioned earlier, the social value model sets out 2 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 may be used on some professional services contracts.



## 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 low value over a long period
- > 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.

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 low value and over a long period
- 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

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## Evaluating Social Value

## Documents included in Tender Process

Where it is scored, Social Value will be included in the Award Criteria and as a schedule within the Invitation to Tender

The Tenderer will be expected to return as part of their tender submission:

1. **Social Value Delivery Plan:** This is an excel spreadsheet which the contractor completes to set out the initiatives they are committing to deliver. *(Social value points approach only)*
2. **Written methodology response** to the evaluation question which sets out HOW the tenderer will address all the requirements of the social value award criteria. This is the part of the response that is scored.



Where it is scored, Social Value will be included in the Award Criteria and as a schedule within the Invitation to Tender

The Tenderer will be expected to return as part of their tender submission:

1. Social Value Delivery Plan: This is an excel spreadsheet which the contractor completes to set out the initiatives they are committing to deliver. *(Social value points approach only)*
2. Written methodology response to the evaluation question which sets out HOW the tenderer will address all the requirements of the social value award criteria. This is the part of the response that is scored.

## 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	Points calculation	Unit of Measurement	Planned Delivery (to be completed by Bidder)	Points Value
Paid employment for people who face barriers to employment.	52 weeks = 75 points	Number of FTE person weeks which will be delivered throughout this contract	156	225
Paid employment for people from the Client's priority group.	52 weeks = 90 points	Number of FTE person weeks which will be delivered throughout this contract		0
Paid employment for people with a disability	52 weeks = 90 points	Number of FTE person weeks which will be delivered throughout this contract		0
Paid employment Apprentices	52 weeks = 75 points	Number of FTE person weeks which will be delivered throughout this contract	156	225
Student Placement/ Professional trainee	52 weeks = 50 points	Number of FTE person weeks which will be delivered throughout this contract		0
Continued employment for a person who has completed their 52 week period	52 weeks = 20 points	Number of FTE person weeks which will be delivered throughout this contract	156	60
Unwaged work placements for people who face barriers to employment	4 weeks FTE = 10 points	Number of FTE person weeks which will be delivered throughout this contract	20	50
Unwaged work placements for people from the Client's priority group or people with disabilities	4 weeks FTE = 15 points	Number of FTE person weeks which will be delivered throughout this contract	12	45
Skills development and educational attainment for people who are considered to be disadvantaged in the labour market or at risk of social exclusion	8 hours of support or training = 10 points	Number of hours which will be delivered throughout this contract		0
Skills development and educational attainment for people from the Client's priority group or people with disabilities	8 hours of support or training = 15 points	Number of hours which will be delivered throughout this contract		0
In-work Progression and Skills Development Strategy	1 Strategy	Strategy will be submitted in relation to work carried out on this contract	yes	Mandatory Requirement

This is an example of a completed Social Value Delivery Plan, which sets out how the tenderer will deliver the specified minimum number of points. Tenderers must confirm they will deliver the mandatory requirements but they do not have to deliver against every other social value initiative 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 a total of 468 weeks of paid employment, 32 weeks of work placements and has confirmed they will deliver the mandatory in-work progression and skills development strategy. They do not intend to deliver skills development initiatives. The minimum indicative number of points will always be proportionate to the contract value.

## Tenderer's methodology should address:

- > **Timescales and metrics** for delivery of the social value requirements;
- > The **resources**, both internal and external, that you will use to plan and deliver the social value requirements (this may include details of suppliers in your supply chain);
- > The **activities** that you will undertake to deliver the social value initiatives, including how you will **engage with key stakeholders** (e.g. social value beneficiaries, organisations within the voluntary, community and social enterprise sector, communities impacted through the delivery of the contract);
- > **Confirmation that the planned activities are additional** to activities your organisation already undertakes; and,
- > How you will **monitor and report** on the delivery of the social value requirements and **address any performance issues**.

Both approaches to scoring social value require a written methodology response to the social value award criteria.

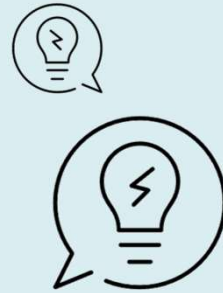
The award criteria will typically evaluate the following:

- Timescales and metrics for delivery of the social value requirements;
- The resources, both internal and external, that you will use to plan and deliver the social value requirements (this may include details of suppliers in your supply chain);
- The activities that you will undertake to deliver the social value initiatives, including how you will engage with key stakeholders (e.g. social value beneficiaries, organisations within the voluntary, community and social enterprise sector, communities impacted through the delivery of the contract);
- Confirmation that the planned activities are additional to activities your organisation already undertakes; and,
- How you will monitor and report on the delivery of the social value requirements and address any performance issues.

## Social value methodology response

Here are some tips that can help you demonstrate social value:

1. Understand what is required of you.
2. Do your research.
3. Be specific.
4. Be relevant.
5. Ensure additionality
6. Be realistic



Understand what is required of you: Check your response is in the correct format (as set out on the procurement documentation). Familiarise yourself with the award criteria and the relevant schedule. Check if there are any mandatory or minimum requirements included. It is important not to presume you know what the Contracting Authority wants to hear. Instead, digest the demands of the question and respond accordingly. Don't, for example, get caught up in writing about adding value through reusing and recycling resources if the question is asking you to detail how you will enhance social value through introducing additional employment/work experience opportunities. Focus on the evaluation criteria as you complete the tender documentation. If you do not provide enough evidence for each criterion then you will not score well in that question.

Do your research: Many public sector organisations publish business or strategic plans setting out their specific social, economic and environmental agenda. These documents may be referenced to as part of the tender or may be available on the public sector body website. You can access a range of useful resources on the Social Value Unit's website. It may also be helpful to consult the Find a Broker section of the website database which provides details on organisations who may be able to work together with you to help you deliver social value. It's important to do your reading and ensure you demonstrate that you understand the Contracting Authority's priorities and how you will contribute to them in your response.

Be specific: Don't be vague. Make tangible commitments and include:

- Activities, e.g. what you will do
- Figures, e.g. how much you will do
- Timescales, e.g. over what time period
- Precise objectives and targets where possible, e.g. how you will measure and report achievement
- Responsibility for overseeing delivery of the social value requirements
- Resources (e.g. which internal resources and external partnerships will you use to deliver the requirements)

Be relevant: Do not use stock answers. Make sure your response is specific to the subject matter of the contract and the buying organisation's priorities. Any benefits identified as social value in tenders or contracts must be over and above the core deliverables of the tender or the contract.

Ensure additionality: The social value that you attribute to each contract needs to be generated by that contract. You can't claim the social value for eight apprentices if only four of them will be working on that project. Ensure that your social value initiatives are relevant to the Contract only. Do not submit general Corporate Social Responsibility policies.

Be realistic: Only make commitments that you can deliver. Suppliers will be required to adhere to the commitments they make. Social Value offers will be built into the contract of the successful bidder and poor performance will be managed in line with Procurement Guidance Note PGN 01/12: Contract Management Principles and Procedures

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## Below threshold Construction contracts



## Below Threshold Construction Contracts

- > Although PPN 01/21 refers to the mandatory requirement to score Social value in Contracts above the UK Procurement threshold, **Contracting Authorities may choose to score Social Value on contracts below threshold.**
- > Even when they choose not to score, **social value can still be included in the Specification or as a Condition of Contract.**
- > The Social Value Points approach is scalable based on contract value and is usually applied on below threshold construction contracts.
- > **A Post-Award Social Value Delivery Plan is completed by the winning Supplier.**

Although PPN 01/21 refers to the mandatory requirement to score Social value in Contracts above the UK Procurement threshold, Contracting Authorities may choose to score Social Value on contracts below threshold.

Even if they choose not to score, PPN 01/21 requires that they incorporate social value in the specification or conditions of contract in contracts above £500,000 and below the UK threshold.

As the social value points approach is scalable based on contract value and is usually applied on below threshold construction contracts. In this case, a post-award social value delivering plan will be required to be completed by the winning Supplier.

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## Managing and monitoring social value

## 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

**Supplier tip:**

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

**Supplier 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.

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 Client contract manager.

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. .



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

When a contract including social value requirements is awarded, the Contracting Authority must inform the Social Value Unit at SIB via [socialvalueni@sibni.org](mailto:socialvalueni@sibni.org) They 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.



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- 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 for you to use to record any efforts that you have made to fulfil the targets;
- Be emailed a report at regular intervals, along with the Client Project Manager.

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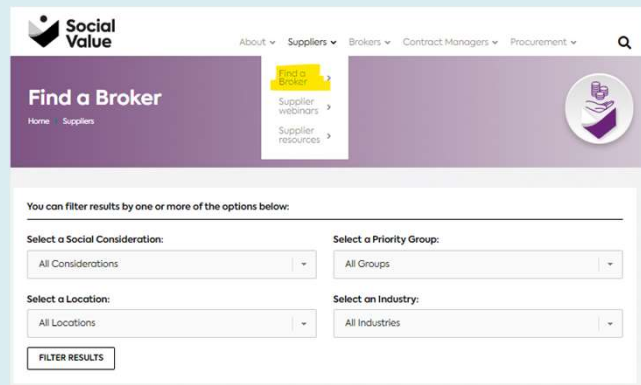
## Social Value Brokers

## Find a Broker



Brokers are organisations in Northern Ireland who:

- > can benefit from the social value initiatives public sector suppliers deliver;
- > work with people who can benefit from the social value initiatives; or,
- > have knowledge and skills to support suppliers to deliver social value initiatives.



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The 'Find a Broker' section on the Social Value website (<https://buysocialni.org/contractors/find-a-broker/>) helps suppliers who win public contracts find brokers who can assist them in delivering their social value requirements.

This is one of the ways we try to make it as easy as possible for suppliers and brokers to work together. You can see the link highlighted in yellow on the screen there.

Brokers have the skills, expertise and connections to help suppliers deliver their social value requirements by:

- linking them with people who are eligible for employment, work placement or skills development opportunities
- sharing their knowledge to help suppliers deliver training or action plans

- being a Voluntary, Community, Social Enterprise which is eligible to receive business development and knowledge sharing support, or be included in the supply chain



## Waterside Youth Centre (WYC) contract

Connelly & Fee and Education Authority worked together to coordinate early and effective engagement with the youth leaders and young people from WYC, the staff at Good Shepherd PS, which shares an entrance with WYC, and the wider residential and business community.

### Results

- > Hosted art work competition focused on the needs and aspirations of the young people, and to foster a sense of belonging
- > Biodiversity workshops for Good Shepherd Primary School
- > 140 weeks of employment

*"This project will serve as a flagship project in terms of how social value delivery can be achieved through good stakeholder engagement and innovation and ultimately for the benefit of children and young people."*



We will now look at two examples of how this works in practice. The first demonstrates how early and effective engagement with those who are impacted by the delivery of the contract is vital to effective social value delivery.

Connelly and Fee were contracted to deliver the construction of the new Waterside Youth Centre, which is a community-based project, delivered into the heart of the Waterside Area of Derry-Londonderry, with a longstanding history rooted in the arts and culture.

EA and C&F worked in partnership to develop a project specific Social Value Delivery Plan (SVDP) in response to the feedback they gathered from youth leaders and young people from WYC, the staff at Good Shepherd PS, which shares an entrance with WYC, and the wider residential and business community. The SVDP included social value initiatives tailored to benefit the Youth Club members, the EA's priority groups and the wider community.

Connelly & Fee hosted an art competition, with the winning art framed and displayed in the new youth centre building. The theme was 'What the youth centre means to me'. This focused on creative flair and also facilitated important discussions on the needs and aspirations of the young people, highlighting the importance of the ongoing youth work. The art competition helped the children and young people feel more involved, helping them feel ownership of the new facility and created a sense of belonging.

For Good Shepherd Primary school the focus was sustainability and learning. C&F facilitated 'plant and play' roadshow which was an opportunity for the children to learn about ecosystems and local wildlife. They planted flowers and vegetables which they took home to nurture.

A critical component of social delivery for the wider community was local employment and upskilling, with a view to tackling social and employment challenges within the area. On this project C&F worked with local brokers to deliver 140 weeks of employment for local people. One key appointment was the introduction of a local Site Manager.

## Grounds Maintenance

- Idverde subcontracts The Turnaround Project's social enterprise, Outwork.
- Outwork has 3 or 4 people working on Idverde contracts for 4.5 days per week.
- Over 4 years, a trusted relationship has been built between the supplier and social enterprise.

*Good communication and flexibility are vital. Idverde goes beyond obligations by also providing staff training and equipment for us. Some people we work with have gone onto become Idverde employees."*

CEO at The Turnaround Project

*"Our partnership is win-win. It addresses our recruitment challenges while delivering our social value requirements by offering opportunities to people who face barriers to employment."*

Sustainability Manager at Idverde



The second example is a partnership between Idverde and The Turnaround Project. Idverde is contracted to deliver ground maintenance services for the NI Housing Executive and some Housing Associations. The Turnaround Project's mission is 'to work with society to enable people who have served sentences to turn around their futures'.

Idverde subcontracts some of the work to The Turnaround Project's social enterprise, Outwork. Outwork offer a range of grounds maintenance and cleaning services for companies, organisations and domestic clients. Outwork currently has a team of 3 or 4 people working on Idverde contracts 4.5 days per week.

The nature of ground maintenance means that the work is seasonal which presents recruitment challenges for Idverde. "Our partnership with The Turnaround Project is win-win. It addresses our recruitment challenges while delivering our social value requirements by offering opportunities to people who face barriers to employment," said Gemma Fawcett, Sustainability Manager at Idverde.

Over the past 4 years, a trusted relationship has been built between the supplier and social enterprise. Richard Good, CEO of The Turnaround Project, explains, "Good communication and flexibility are vital. Idverde goes beyond obligations by also providing staff training and equipment for us. Some of the people we work with have gone onto become Idverde employees when their time with us has ended."

This partnership is helping people who have been through the justice system to overcome barriers to employment.

## Summary

- > A **minimum of 10% of total award criteria will be allocated to social value** in all Services contracts above £500,000 (inclusive of VAT) and Construction contracts above the UK Procurement threshold.
- > Where appropriate, **public bodies can include social value on contracts outside of these thresholds**
- > The social value approaches are based on the **4 social value themes**
- > Suppliers should **attend supplier engagement events and respond** to preliminary market engagement questions.
- > **Monitoring progress** of social value delivered on a contract helps to keep to agreed targets and ensure value for money.

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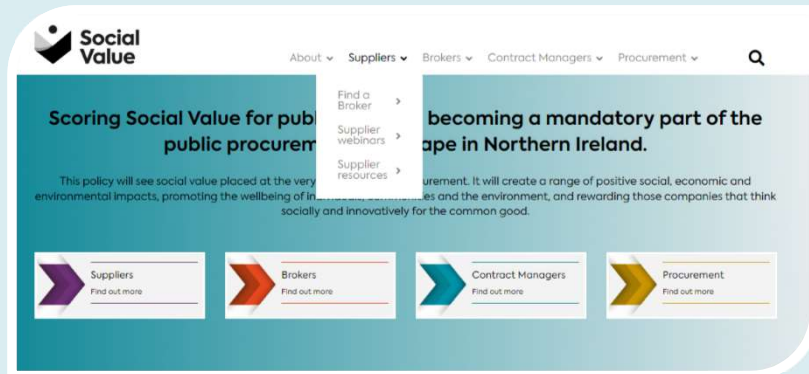
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## Supplier resources

- > Webinars and written guidance for suppliers is available at [socialvalueni.org](https://socialvalueni.org)



Further resources are available on the Supplier section of the Social Value Unit website. You can access various webinars, written guidance and the Find a Broker database, as you can see how to access on screen now.

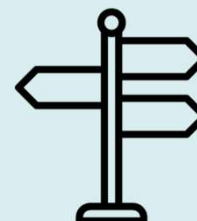
## What you can do next

### Information & Training

- > Sign up to our newsletter
- > Sign up to attend more detailed virtual training

### Apply your knowledge

- > Embed the tips into your existing practices and discuss them with your team
- > Reach out to relevant Broker organisations to explore working together



[socialvalueni@sibni.org](mailto:socialvalueni@sibni.org)

[www.socialvalueni.org](http://www.socialvalueni.org)

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Thank you.