

Delivering Social Value in Northern Ireland

**Information session for Suppliers –
Services and IT**

This is an information session for suppliers of the public sector and will cover how social value is included throughout the procurement of relevant Services and IT 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.

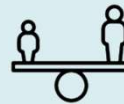
The social value derived from a public contract is the positive legacy created through its performance such as a more diverse workforce, fewer single use plastics in the environment and more cohesive communities.

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 contracts for services 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.
- > 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 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.

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.

PPN 01/21 – Social Value in Procurement

- > 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**



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

The PPN goes on to state that Social value will be scored based on 4 themes – which we will cover in a couple of slides time – and that The policy will be reviewed ahead of 2027.

Those are the main headlines from the PPN but, of course, if you would like to read the policy note in more details, the PPN is available to download from the Department of Finance's website.

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.

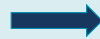
Contracting Authorities may select one or multiple themes for inclusion in the social value requirements of the contract, in order to reflect the Authority's strategic priorities.

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

Social Value themes



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.



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

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 to align with 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.

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.

By contributing to a Contracting Authority's pre-procurement engagement, 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

Buying Social – award criteria

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 set out in the policy and both evaluate Tenderers' qualitative responses to the award criterion.

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

- 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.

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
	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)	£ 18.0 million
Total Social Value points to be delivered	1800 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 below under '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	Points Calculation	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	52 weeks FTE = 75 points	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	4 weeks FTE = 10 points	Number of FTE person weeks which will be delivered throughout this contract		0
Digital skills development and educational attainment for people who are considered to be at risk of digital exclusion	8 hours support or training = 10 points	Number of hours which will be delivered throughout this contract	440	550
In-work Progression and Skills Development action plan	1 action plan = 30 points	action plan will be submitted in relation to work carried out on this contract	yes	30
Inclusion of Social Enterprises in the contract's supply chain	Use of one social enterprise in the supply chain = 30 points	Number of one social enterprises in the supply chain (in relation to work carried out on this contract)		0
Inclusion of Micro Enterprise in the contract's supply chain	Use of at least one micro enterprise in the supply chain = 20 points	Number of micro enterprises in the supply chain (in relation to work carried out on this contract)	1	20

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, 440 hours of digital skills development, an in-work progression and skills development action plan and include 1 micro enterprise in the supply chain. 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

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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 initiatives 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**

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 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

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.

Buying Social Value – evaluation

Evaluating social value

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

Tenderers' submit:

- > **Written methodology response**
- > **Social value delivery plan (social value points only)**

The panel member uses a scoring matrix to score the quality of the response. The matrix is included in the contract's invitation to tender.



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

Tenderers submit:

Written methodology response, which details how the tenderer will address all the requirements of the social value award criteria.

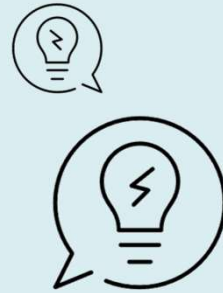
Social value delivery plan (social value points only), which allows the tenderer to set out the initiatives they plan to deliver and demonstrate how they will meet the points target.

The panel member uses a scoring matrix to score the quality of the response. The matrix is included in the contract's invitation to tender.

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



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

1. 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. 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.

2. 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.

3. 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)

4. 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.

5. 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.

6. 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.

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 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.



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 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.

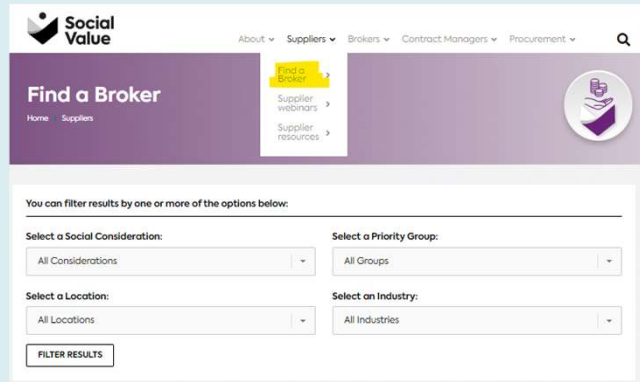
Social Value Brokers

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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- 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.

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

IT contract

Elite Training and Consultancy Limited were required to deliver Business Development and Knowledge Sharing with a VCSE organisation.

Results

- > Online calculator to enable NIACRO's participants to determine when their criminal record becomes 'spent'.
- > The tool is now available, free of charge, via NIACRO's DisclosureNI website.

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The Supplier had a unique combination of skills and experience, and we were able to maximise this with a project that both met our needs and fitted their brief, giving us the freedom to think creatively about a project that we may not have contemplated were we not afforded the gift of the Supplier's time."

elite | training (NI) ltd



We will now look at two examples of how this works in practice. The first partnership is between the Northern Ireland Association for the Care and Resettlement of Offenders (NIACRO) and Elite Training and Consultancy Limited, which is a local IT company contracted to deliver a large public sector IT contract. NIACRO is a voluntary organisation committed to reducing crime and its impact on people and communities through working with children and young people, families affected by imprisonment and adults in prison and the community.

This collaboration involved designing and building an online calculator which would enable NIACRO's participants to determine when their criminal record becomes 'spent'. The supplier worked closely with NIACRO to understand the legislative framework, design and build the tool, and undertake extensive user testing to ensure the calculator met the needs of their participants. This tool is now available, free of charge, via NIACRO's DisclosureNI website.

The Programme Manager from NIACRO commented that: "The time and expertise Elite Training and Consultancy Limited gave NIACRO to develop a new online tool has been invaluable. The impact of the work is set to have far reaching positive consequences for the people NIACRO support, and help us to unlock the potential they have by de-mystifying the disclosure process. The Supplier had a unique combination of skills and experience, and we were able to maximise this with a project that both met our needs and fitted their brief, giving us the freedom to think creatively about a project that we may not have contemplated were we not afforded the gift of the Supplier's time."

Sean Walsh from Elite Training and Consultancy Services Ltd who led on the delivery commented that: "Social Value is an excellent idea. It inspires collaboration that would otherwise not exist. In our case, we sought out a partner that we would otherwise not have found, conducted work we would otherwise not have done and made a positive social contribution we would otherwise not have made."

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 IT and Services contracts above £500,000.
- > 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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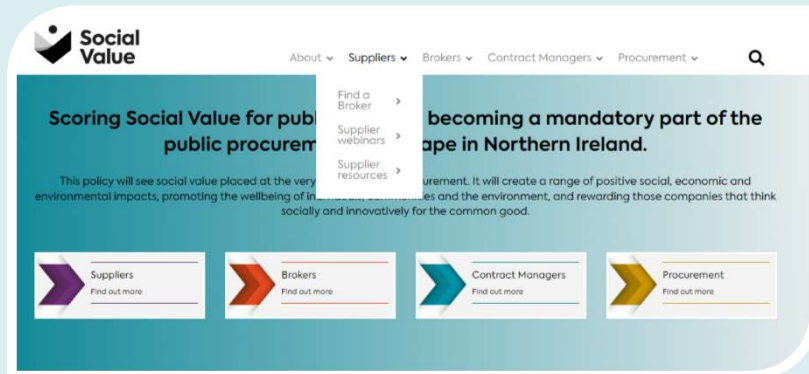
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Further resources are available on the Contract Manager section of the Social Value Unit website.

Supplier resources



- > Webinars and written guidance for suppliers is available at 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.

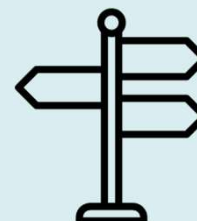
What you can do next

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

www.socialvalueni.org

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Thank you.