

Scoring Social Value

**Checklist for including
Social Value Points approach
on Supplies Contracts**

Introduction

This paper sets out a suggested list of actions for public sector bodies when applying the social value points approach on Supplies contracts as part of the award criterion.

The following resources will support commissioners and procurement teams to identify the most relevant social value themes, indicators and initiatives for a specific contract:

- [Procurement Policy Note \(PPN\) 01/21 \(Scoring Social Value\)](#).
- [Scoring Social Value Guidance for Supplies Contracts](#)
- [Scoring Social Value e-learning module¹](#)
- [Model award criteria for points approach on Supplies Contracts](#)
- [Social Value Delivery Plan template for Supplies contracts](#)
- [Spreadsheet of Themes, Indicators and Social Value Initiatives for Supplies contracts](#)

All of the above resources (with the exception of PPN 01/21) are available on the [Social Value website](#). Links have also been provided within the tables below.

The Social Value Points approach is the default approach for Supplies contracts where the estimated contract value is greater than £250,000 per annum per supplier.

¹ The e-learning module was developed specifically for Services and IT contracts. However, the same principles apply when scoring social value in Supplies contracts.

Checklist for Applying Social Value Points Approach on Supplies Contracts

1. Thinking Social

| Suggested Action | Resources |
|---|---|
| Signpost commissioner to DoF supplementary guidance on including social value within business cases | <u>Better Business Cases NI Supplementary Guidance - Incorporating Social Value into Business Cases</u> |
| Include model text on social value if conducting pre-market engagement activities | <u>Model Pre-procurement Engagement Question</u> |
| Identify relevant social value themes, indicators and initiatives based on subject matter of their contract | <u>Scoring social value in services and IT contracts - e-learning²</u> <u>PPN 01/21 Social Value Themes, Indicators and Initiatives for Supplies Contracts</u> <u>Scoring Social Value in Supplies contracts - Guidance for Public Sector Bodies</u> |
| Identify relevant approach to scoring social value (i.e., Social Value Points Approach or Alternative Approach) | <u>Scoring social value in services and IT contracts - e-learning³</u> <u>Scoring Social Value in Supplies contracts - Guidance for Public Sector Bodies</u> |
| Include signposting reference in the Specification to the Social Value Schedule. | N/A |

² The e-learning module was developed specifically for Services and IT contracts. However, the same principles apply when selecting relevant social value themes and indicators in Supplies contracts.

³ As above.

2. Buying Social

- **Model Award Criteria for social value points approach**

| Suggested Actions for Model Award Criteria | Resources |
|---|---|
| Insert relevant schedule and clause numbers throughout as per numbering in Social Value Schedule | N/A |
| Ensure indicative number of points has been inserted into the evaluation question | |
| Update supplier guidance if minimum requirements have been applied (model wording provided in drafting notes) | |
| Insert page limit for bidder responses (as appropriate) | |
| Remove drafting notes | |
| Ensure model award criteria is consistent with scoring matrix and amend as appropriate | Contracting Authority's scoring matrix ⁴ |
| Decide and agree on a minimum score for social value (if appropriate) | N/A |

- **Social Value Delivery Plan for social value points approach**

| Suggested Actions for Social Value Delivery Plan | Resources |
|---|---|
| Insert schedule number within tab 3 | Social Value Delivery Plan – Supplies contracts |
| Insert contract value and duration within tab 3 | |
| Ensure social value initiatives included within Social Value Delivery Plan are consistent with those included within Social Value Schedule. Delete all initiatives which do not apply to this specific contract | |
| If including minimum mandatory requirements, ensure model wording is included within Social Value Delivery Plan – refer to drafting notes | |
| Remove drafting notes | |

- **Social Value Schedule (Contract performance clauses for social value points approach)**

| Suggested Action | Resources |
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| Insert references to schedule number and clause numbers throughout as per drafting notes | |

⁴ An example scoring matrix is included in Scoring Social Value in Supplies contracts - Guidance for Public Sector Bodies.

| | |
|--|---|
| <p>Select Social Value Delivery Plan clause in line with chosen procurement procedure</p> | <p>Model Text for Inclusion in the Specification and/or Invitation to Tender (social value points)</p> |
| <p>Include minimum requirements (as appropriate) against any social value priorities identified by the Contracting Authority – refer to drafting notes for model wording and relevant sections</p> | |
| <p>If the scope of the contract involves a heightened risk of Modern Slavery and/or environmental risks, consider applying mandatory requirements against the Modern Slavery Assessment Tool and one of the environmental initiatives – model wording provided within drafting notes</p> | |
| <p>Assign / remove reference to priority groups, as appropriate.</p> | <p>Model Text for Inclusion in the Specification and/or Invitation to Tender (social value points)</p> <p>Guidance on how to include priority groups is available within Scoring Social Value Guidance in Supplies contracts for Public Sector Bodies</p> |
| <p>Delete any themes, indicators and social value initiatives from the Social Value Points Matrix within clause 3.1 which will not apply to this contract</p> | <p>Model Text for Inclusion in the Specification and/or Invitation to Tender (social value points)</p> |
| <p>Include clauses relating to the social value initiatives selected within Social Value Points Matrix within clause 3.1. Remove all other clauses (e.g., if you have included paid employment within 3.1 ensure you included the relevant contract performance clause on this)</p> | |
| <p>Ensure Social Value Points Matrix within clause 3.1 is consistent with social value initiatives selected within Social Value Delivery Plan</p> | |
| <p>If including one of the strategy options (e.g., health and wellbeing strategy), insert required timeframe for submission of strategy as highlighted in drafting notes</p> | |
| <p>Include requirements on data protection if you have included employment opportunities as an initiative. Otherwise, remove clause.</p> | |

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|---|--|
| Update required information within clause on “monitoring information” in line with selected initiatives (e.g. if you have selected skills development and educational attainment as one of the initiatives ensure this is included within the monitoring information) | |
|---|--|

3. Monitoring and Managing Social

| Suggested Action | Resources |
|--|--|
| Inform Social Value Unit when contract has been awarded | <u>Notification of Contract Award - Social Value</u> |
| Send Contracting Authority’s Contract Manager a copy of the Supplier’s Social Value Delivery Plan, methodology response to the Social Value award criteria and the Social Value Schedule as part of handover process | N/A |
| Send Contract Manager link to resources and training for Contract Managers | <u>Contract Managers - Social Value</u> |
| Contract Manager to add Social Value as a standard agenda item at contract review meetings | N/A |