

Scoring Social Value

Checklist for including Social Value Alternative Approach on Supplies Contracts

Introduction

This paper sets out a suggested list of actions for public sector bodies when applying the social value alternative 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 alternative approach on 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 Alternative approach is the default approach for Supplies contracts where the estimated contract value is less 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 Alternative 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 and indicators based on subject matter of their contract	<u>Scoring social value in services and IT contracts - e-learning²</u> <u>Scoring Social Value in Supplies contracts - Guidance for Public Sector Bodies</u> <u>Selecting Social Value Indicators</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 alternative approach**

Suggested Actions for Model Award Criteria	Resources
Insert relevant schedule and clause numbers throughout as per numbering in Social Value Schedule	Model award criteria for alternative approach on Supplies Contracts
Select the social value indicator(s) you have selected to score from the 2 dropdown lists in the award question	
Update the examples metrics which are relevant to the selected indicator in the Supplier Guidance section of the Alternative Model Award Criteria	
Copy the selected indicator's examples of relevant Social Value Initiatives from the guidance set out below the award question into the Supplier Guidance section of the Alternative Model Award Criteria	
Insert page limit for bidder responses (as appropriate)	
Delete drafting notes and remaining guidance on social value indicators	
Ensure model award criteria is consistent with scoring matrix and amend as appropriate	Contracting Authority's scoring matrix⁴
Decide and agree on a minimum score for social value (if appropriate)	N/A

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

Suggested Action	Resources
Insert references to schedule number and clause numbers throughout as per drafting notes	Model Text for inclusion in the Specification and/or Invitation to Tender (alternative approach)
Delete the text relating to Social Value themes that are not being included on the contract	
Assign / remove reference to priority groups, as appropriate.	Model Text for inclusion in the Specification and/or Invitation to Tender

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

	<p>(alternative approach)</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>Include requirements on paid employment opportunities, support and training, security clearance, data protection and health and safety if you have included an indicator from Theme 1. Otherwise, delete clauses.</p>	<p>Model Text for inclusion in the Specification and/or Invitation to Tender (alternative approach)</p>
<p>Delete any remaining drafting notes</p>	

3. Monitoring and Managing Social

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