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**Model Text for inclusion in the**

**Procurement Documents for Services Contracts**

**Fixed Social Value Indicator Approach**

**SOCIAL VALUE REQUIREMENTS SHOULD BE TAILORED FOR EACH CONTRACT.**

**Under the Fixed Social Value Indicator Approach, the Authority will select the most relevant Social Value Theme(s) and Indicator(s) from PPN 01/21 based on the risks and opportunities analysis, the priorities set out in the Departmental social value strategy and the subject matter of the contract.**

**REMOVE THIS TEXT BOX AND ALL COMMENTS PRIOR TO PUBLICATION**

# SCHEDULE Click here to enter text.: SOCIAL VALUE

# Background

In accordance with the [Procurement Policy Note (PPN) 01/21 (Social Value in Procurement)](https://www.finance-ni.gov.uk/publications/ppn-0121-scoring-social-value), the Supplier is required to deliver measurable social value outcomes.

In support of the PPN 01/21, and in light of the subject matter of the contract, the Contracting Authority has selected Theme 1: Increasing secure employment and skills / Theme 2: Building ethical and resilient supply chains / Theme 3: Delivering climate action / Theme 4: Promoting Wellbeing as the most relevant social value theme to include in this contract.

**Theme 1 – Increasing secure employment and skills** – aims to create employment and training opportunities and contribute to in-work progression and skills development.

The New Decade, New Approach Deal emphasised the importance of access to good jobs, where workers have a voice that provides a level of autonomy, a decent income, security of tenure, satisfying work in the right quantities and decent working conditions. Creating good jobs and protecting workers’ rights impacts upon better health and wellbeing by tackling inequalities, building self-efficacy and combating poverty and also helps employers to attract and retain the talent they need to grow and thrive.

**Theme 2 – 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, and promote diverse and secure supply chains.

Doing business with respect for human rights is linked to business opportunities such as: improved employee retention and recruitment rates; greater access to customers and buyers who increasingly value ethical practices; and improved relationships with workers, communities and stakeholders, resulting in a stronger business reputation. Ensuring supply chains are ethical contributes to sustainable development, protects the human rights of individuals, provides job opportunities and brings families out of poverty. By providing decent work and demanding suppliers do the same, organisations invest in the future of communities.

**Theme 3 – Delivering climate action** – aims to promote environmental benefits, influence environmental protection and improvement and work towards net zero greenhouse gas emissions.

The Executive’s Green Growth Strategy aims to ensure the sustainability of Northern Ireland’s natural environment, while fostering the necessary conditions for innovation, investment and competition that can give rise to new sources of economic growth, while building resilient ecosystems. By doing so, we can create jobs, reduce carbon, enhance profitability, lower waste, increase efficiency and protect our environment and climate for future generations.

**Theme 4 – Promoting wellbeing** – aims to promote the economic, social, environmental and democratic wellbeing of the contract workforce and the wider community.

The Public Health Agency (PHA)[[1]](#footnote-1) recognises that using the workplace as a setting to promote and support health and wellbeing makes good business sense and has many benefits for both employers and employees which is especially important as workplaces emerge from the COVID-19 pandemic. According to the World Health Organisation, the definition of a healthy workforce is: ‘... one in which workers and managers collaborate to use a continual improvement process to protect and promote the health, safety and wellbeing of all workers and the sustainability of the workplace’.[[2]](#footnote-2)

To help achieve these objectives and address the strategic aims, it is required that the successful Supplier will deliver measurable social value outcomes linked to the Social Value Indicators as set out in the Invitation to Tender.

**X.0 Social Value Delivery**

**Theme 1 - the supplier will deliver the employment and skills related initiatives which they committed to in their tender methodology or as otherwise agreed by the Authority at the Authorities discretion. The requirements set out below will apply where the supplier has selected that particular initiative in their tender methodology.**

## X.0 Paid Employment Opportunities

The delivery of paid employment on the contract for people who are furthest from the labour market and/or from deprived areas. The Supplier must ensure that they satisfy one of the following categories:

* a person who is in education or has left education in the last 12 months and is seeking employment;
* people who are long-term unemployed[[3]](#footnote-3)
* people who have a disability and are seeking employment
* people who are located in deprived[[4]](#footnote-4) areas and are seeking employment
* people who are underrepresented and new to the sector and are seeking employment
* people who meet the conditions of the Authority’s Priority Groups, as set out at clause Click here to enter text. and are seeking employment
* another person who faces barriers to employment or who is at risk of social exclusion and is seeking employment, as accepted by the Authority, at the Authority’s discretion

Each employment vacancy must be notified to JobApplyNI ([www.jobapplyni.com](http://www.jobapplyni.com)) and one or more organisations registered on the Social Value Unit website ([www.socialvalueni.org/contractors/find-a-broker/](http://www.socialvalueni.org/contractors/find-a-broker/)) and/or equivalent agencies named by or agreed with the Authority for this purpose. Sufficient time must be allowed for information on vacancies to be made available and applications submitted.

**X.1 Support and Training**

Each beneficiary must be:

* provided with the opportunity to obtain training and accreditation relevant to the tasks they are expected to perform;
* asked if they would like to receive support with numeracy, literacy and information technology, and those that do must be signposted to sources of training and accreditation for these Essential Skills;
* supported in undertaking training e.g. through flexible working arrangements, where practicable;
* supported in developing soft skills relevant to the workplace (e.g. communication, teamworking, time management, problem-solving etc.).

The costs of training and accreditation/registration must be covered by the Supplier either directly or through public or industry sources that they identify.

## X.0 Unwaged work placements

The delivery of unwaged work placements on the contract for:

* people who face barriers to employment and/or who are located in deprived areas. This can include for example, people who are long-term unemployed, people who are located in deprived areas[[5]](#footnote-5), people who have a disability and people who are underrepresented in the contract’s workforce.

The Supplier is to provide work placement participants with meaningful work experience, training and development which will enhance their opportunities for future employment.

Each unpaid work placement opportunity must be notified to one or more organisations registered on the Social Value Unit website ([www.socialvalueni.org/Suppliers/find-a-broker/](http://www.socialvalueni.org/Suppliers/find-a-broker/)) and/or equivalent agencies named by or agreed with the Authority for this purpose.

The Department of Communities works with employers to offer meaning work placements. Learn more about the support available [here](https://www.nibusinessinfo.co.uk/content/work-experience-programme).

## X.0 Skills development and educational attainment

The delivery of skills development and educational attainment support in areas related to the contract to an education provider or organisation within the Voluntary, Community and Social Enterprise sector to aid the career development of:

* people who are considered to be disadvantaged in the labour market or at risk of social exclusion. This can include for example, people who are long-term unemployed, people who are located in deprived areas, people who have a disability and people who are underrepresented in the contracts workforce.
* people who meet the Contracting Authority’s priority groups, as set out at Click here to enter text.. *[remove if not appropriate]*

Each opportunity must be notified to one or more organisations registered on the Social Value Unit website ([www.socialvalueni.org/Suppliers/find-a-broker/](http://www.socialvalueni.org/Suppliers/find-a-broker/)) and/or equivalent agencies named by or agreed with the Authority for this purpose.

## X.0 In-work progression and skills development for employees who are disadvantaged

The New Decade, New Approach Deal emphasised the importance of access to good jobs, where workers have a voice that provides a level of autonomy, a decent income, security of tenure, satisfying work in the right quantities and decent working conditions. The Skills Strategy for Northern Ireland (Skills for a 10x Economy) sets out the importance of tackling social and educational inequality, ensuring appropriate pathways are in place to enable all our citizens to reach their potential, benefitting from and contributing to a stronger, more prosperous, more resilient Northern Ireland. Creating good jobs and protecting workers’ rights impacts upon better health and wellbeing by tackling inequalities, building self-efficacy and combating poverty and also helps employers to attract and retain the talent they need to grow and thrive.

The Supplier will deliver activities to promote and support In-work Progression and Skills Development in the contract’s workforce for those employees who are disadvantaged. This could include, for example, people who were long-term unemployed, people who have a disability, looked after children/care leavers and people who are underrepresented in the contract’s workforce.

**Theme 2 - the supplier will deliver initiatives to build ethical and resilient supply chains which they committed to in their tender methodology or as otherwise agreed by the Authority in conjunction with the clause(s) below.**

## X.0 Inclusion of VCSE Organisations and Micro Enterprises including Ethnic Minority Owner/Led in the contract’s supply chain

The Supplier will include social enterprises/charities or micro businesses based in Northern Ireland in the supply chain, in relation to any sub-contracting or other business opportunities available as a result of this contract.   The Supplier should ensure this is a meaningful opportunity for the social enterprise/charity or micro business. Each VCSE organisation or micro enterprise included within the supply chain will be eligible for achieving the points against this initiative rather than each contract with the enterprise.

Social Enterprise NI (SENI) (<https://www.socialenterpriseni.org>) is the representative body for social enterprises in Northern Ireland. SENI connect, support, develop and sustain vibrant businesses to create social change. SENI can provide advice and guidance to help businesses who want to explore opportunities to work with social enterprises in Northern Ireland.

Any action taken by the Authority or their agents to broker relationships between the Supplier and local individuals/firms/agencies does not imply and should not be deemed to imply that they or their agents consider the individual/firm/agency as suitable for engagement by the Supplier.

## X.0 Business development and knowledge sharing with a voluntary, community and social enterprise organisation, a microenterprise (including, minority ethnic led enterprises)

The Supplier will deliver skilled advice in an area related to the contract to:

* an organisation/organisations within the Voluntary, Community and Social Enterprise (VCSE) sector; or
* micro businesses or

Each skilled advice opportunity should be developed in collaboration with the relevant beneficiary organisation.

Each skilled advice opportunity must be notified to one or more organisations registered on the Social Value Unit’s website ([www.socialvalueni.org/contractors/find-a-broker/](http://www.socialvalueni.org/contractors/find-a-broker/)) and/or equivalent agencies named by or agreed with the Authority for this purpose.

**Theme 3 - the supplier will deliver initiatives to deliver climate action which they committed to in their bid methodology or as otherwise agreed by the Authority in conjunction with the clause(s) below.**

## X.0 Environmental Initiatives

The delivery of environmental initiatives in areas related to the Contract designed to influence staff, suppliers, customers and communities through the delivery of the contract to support environmental protection and improvement, including implementation of climate adaptation measures.

**Theme 4 - the supplier will deliver initiatives to promote wellbeing which they committed to in their bid methodology or as otherwise agreed by the Authority in conjunction with the clause(s) below.**

**X.0 Wellbeing initiatives to support employees including those working remotely on the contract.**

The Public Health Agency (PHA) recognises that using the workplace as a setting to promote and support health and wellbeing makes good business sense and has many benefits for both employers and employees. According to the World Health Organisation, the definition of a healthy workforce is: ‘... one in which workers and managers collaborate to use a continual improvement process to protect and promote the health, safety and wellbeing of all workers and the sustainability of the workplace’.[[6]](#footnote-6)

The Supplier will deliver initiatives that are designed to support the wellbeing of employees working on the contract, including those who are working remotely. These initiatives should address specific wellbeing risks and/or opportunities on the contract.

The [Mental Health Charter](https://www.equalityni.org/MentalHealthCharter) for employers and service providers provides a framework for working towards mentally healthy workplaces and has been jointly produced by the Equality Commission NI, Action Mental Health, Disability Action, MindWise, Mental Health Foundation and Inspire.

**X.0 Initiatives to support the wellbeing of staff, suppliers, customers and communities in the delivery of the contract**

The Supplier will deliver initiatives that are designed to influence suppliers, customers and communities through the delivery of the contract to support wellbeing, including physical and mental health.

Initiatives must focus on the wellbeing risks and opportunities on the contract and allow for codesign and coproduction with the intended beneficiaries.

Initiatives can be run in partnership with an organisation from the Voluntary, Community and Social Enterprise sector or as part of a company programme.

The [Mental Health Charter](https://www.equalityni.org/MentalHealthCharter) for employers and service providers provides a framework for working towards mentally healthy workplaces and has been jointly produced by the Equality Commission NI, Action Mental Health, Disability Action, MindWise, Mental Health Foundation and Inspire.

X.0 Equality, diversity & inclusion positive action

The development and delivery of a lawful outreach plan for positive action for the Contract which aims to increase applications for the Contract’s employment opportunities from individuals who face barriers to employment or who are underrepresented in the Contract’s workforce.

You will find further information on lawful positive action from the Equality Commission for Northern Ireland [here](https://www.equalityni.org/Employers-Service-Providers/Recruiting-people-with-disabilities/Positive-action-(1)). Further detailed guidance on developing and implementing lawful positive action outreach is available from the Equality Commission of NI: [PositiveActionEmployerGuide.pdf (equalityni.org)](https://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/PositiveActionEmployerGuide.pdf)

# General requirements

## X.0 Positive Action to maximise employment opportunities *(only include when Theme 1 selected)*

All employment vacancies on the contract are to be notified by the Supplier to [www.jobapplyni.com](http://www.jobapplyni.com) and one or more organisations registered on the Social Value website ([www.socialvalueni.org/Suppliers/find-a-broker/](http://www.socialvalueni.org/Suppliers/find-a-broker/)) and other agencies named by or agreed with the Authority for this purpose. Sufficient time must be allowed for information on vacancies to be made available and applications submitted.

## X.0 Security clearance

The Supplier shall obtain security clearance for all persons visiting the workplace in relation to employment, work experience or site visits to the same standard as all other personnel involved in the contract in accordance with the Contract Information.

## X.0 Data Protection *(include when Paid Employment Opportunities included only)*

Where the Supplier has selected to provide Social Value paid employment opportunities the following Data Protection arrangements will apply.

A Data Protection Consent Form (as provided) must be completed by each person in the Supplier’s Social Value Monitoring Report and therefore counted towards the Social Value target for the contract. Consent shall be provided on a voluntary basis and can be withdrawn at any time (as noted within the Data Protection Consent Form). Completed Consent Forms must be sent to the Strategic Investment Board.  Notwithstanding the above, the Supplier shall ensure it satisfies itself in respect of its obligations under the Data Protection Act 2018 (as may be amended from time to time) and the UK General Data Protection Regulation (GDPR).

The Supplier, at contract award, shall enter into a Data Processing Agreement with the Strategic Investment Board. This is to enable the sharing of personal information (provided in the Social Value Monitoring Report) for the purposes of checking and verification.

The Supplier must only engage a Sub-processor, in relation to the Social Value requirements, with the prior consent of the Strategic Investment Board and must enter into a Data Processing Agreement with any Sub-processor with whom the information in the Supplier’s Social Value Monitoring Report is shared.

## X.0 Health and Safety *(only include when Theme 1 selected)*

It is the responsibility of the Supplier to ensure that the necessary internal policies, procedures and training are in place before delivering social value requirements, for example in relation to health and safety, and safeguarding.

The Supplier must ensure that persons recruited or otherwise visiting the worksite in relation to the social value requirements has or is supported to obtain the necessary health and safety accreditation or other appropriate measures, and has appropriate personal protective equipment if necessary.

## X.0 Costs

The Supplier shall deliver the social value requirements within their tender sum (omitting any grants or other public funding that will be obtained to offset the costs of delivering the social value requirements).

## X.0 Connecting with Voluntary, Community and Social Enterprise organisations

Organisations who are based in Northern Ireland and are interested in partnering with suppliers to deliver social value requirements are listed on the Social Value Unit website ([www.socialvalueni.org/Suppliers/find-a-broker/](http://www.socialvalueni.org/Suppliers/find-a-broker/)).Social Enterprise NI has also established an online directory (https://socialenterpriseni.org/directory) of Social Enterprises which could be included in your public contract's supply chain.

Responsibility for sourcing social value beneficiaries remains with the Supplier.

Any action taken by the Authority to broker relationships between the Supplier and local individuals/firms/agencies does not imply and should not be deemed to imply that they or their agents consider the individual/firm/agency as suitable for engagement by the Supplier.

## X.0 Sub-contractors

It is the Supplier’s responsibility to develop a working method and where necessary secure sub-contractor co-operation in order to achieve the Authority’s social value requirements.

## X.0 Monitoring Information

The Supplier shall provide a completed Social Value Monitoring Report every month using the Social Value online monitoring system. The supplier shall update the social value monitoring system with the metrics below in accordance with the clauses set out above and the initiatives the supplier committed to in their award response. The Authority retains the right to request interim reports and additional information on social value delivery, including for case studies.

* Number of weeks of paid employment opportunities on the contract for relevant the groups set out at clause at X.X.
* Number of weeks of unwaged work placements delivered on the contract.
* Number of hours of skills development and educational attainment delivered in areas related to the contract.
* Number of hours of in-work progress and skills development for employees who are disadvantaged on the contract.
* Number of VCSEs, Micro Enterprises including Minority Ethnic Led Enterprises in the contract’s supply chain.
* Number of hours of skilled advice in an area related to the contract which were delivered to VCSEs, Micro Enterprises or Minority Ethnic Led Enterprises.
* Number of hours of Environmental Initiatives which were delivered in areas related to the contract.
* Number of hours of Wellbeing Initiatives which were delivered in areas related to the contract.
* Number of hours of Equality, Diversity and Inclusion Initiatives which were delivered in areas related to the contract.

The Supplier shall provide all information necessary, including obtaining it from sub-suppliers and agencies, and cooperate with the Authority's Project Manager to review progress on delivering the overall Social Value requirement as set out at Click here to enter text..

The Supplier should not record any activities on the Social Value Monitoring Reports to the extent that they are delivered [wholly or in part] for a purpose other than satisfying the requirements specified in this Schedule.

1. The Public Health Agency has developed a resource guide to support employers and employees to access information on improving health and wellbeing at work which can be accessed [here](https://www.publichealth.hscni.net/sites/default/files/2020-09/WorkWell_LiveWell_Resource_Guide_09_20%20no%20appendix.pdf) [↑](#footnote-ref-1)
2. [healthy\_workplaces\_model\_action.pdf (who.int)](https://www.who.int/occupational_health/publications/healthy_workplaces_model_action.pdf) [↑](#footnote-ref-2)
3. a person aged under 25 that has been unemployed for more than 26 weeks and is seeking employment; or

   a person aged 25 or over that has been unemployed for more than 52 weeks and is seeking employment. [↑](#footnote-ref-3)
4. NISRA’s multiple deprivation measures (NIMDM 2017) provide a mechanism for ranking the 890 Super Output areas (SOAs) in Northern Ireland from the most deprived (rank 1) to the least deprived (rank 890).  A list of the 100 most deprived areas can be found here [Top100 (nisra.gov.uk)](https://eu-west-1.protection.sophos.com?d=nisra.gov.uk&u=aHR0cHM6Ly93d3cubmlzcmEuZ292LnVrL3NpdGVzL25pc3JhLmdvdi51ay9maWxlcy9wdWJsaWNhdGlvbnMvVG9wJTIwMTAwJTIwU09Bcy5wZGY=&i=NjU1NTQ1Y2Y2MjBmMmMyMzA0ZGU2NDU3&t=TzJsTXdhR293VnMxRmpxVytWYUIxQUluUGdMeHB2RjUxeFVtTm5Ub2VPWT0=&h=061e1c16a85645a4b5adb906c2dcf83d&s=AVNPUEhUT0NFTkNSWVBUSVbyj4lJ0E4Q0g9dojt2up-KGFIfrQfI3fFj36Vhyj3c3Q) For more information see [Northern Ireland Multiple Deprivation Measure 2017 (NIMDM2017) | Northern Ireland Statistics and Research Agency (nisra.gov.uk)](https://eu-west-1.protection.sophos.com?d=nisra.gov.uk&u=aHR0cHM6Ly93d3cubmlzcmEuZ292LnVrL3N0YXRpc3RpY3MvZGVwcml2YXRpb24vbm9ydGhlcm4taXJlbGFuZC1tdWx0aXBsZS1kZXByaXZhdGlvbi1tZWFzdXJlLTIwMTctbmltZG0yMDE3&i=NjU1NTQ1Y2Y2MjBmMmMyMzA0ZGU2NDU3&t=SEk4K2FpNEg5NTVSK3lDZ1BmOS8xZkJ6bUViall4U2ZUdXFid3BGN1plVT0=&h=061e1c16a85645a4b5adb906c2dcf83d&s=AVNPUEhUT0NFTkNSWVBUSVbyj4lJ0E4Q0g9dojt2up-KGFIfrQfI3fFj36Vhyj3c3Q) [↑](#footnote-ref-4)
5. NISRA’s multiple deprivation measures (NIMDM 2017) provide a mechanism for ranking the 890 Super Output areas (SOAs) in Northern Ireland from the most deprived (rank 1) to the least deprived (rank 890).  A list of the 100 most deprived areas can be found here [Top100 (nisra.gov.uk)](https://eu-west-1.protection.sophos.com?d=nisra.gov.uk&u=aHR0cHM6Ly93d3cubmlzcmEuZ292LnVrL3NpdGVzL25pc3JhLmdvdi51ay9maWxlcy9wdWJsaWNhdGlvbnMvVG9wJTIwMTAwJTIwU09Bcy5wZGY=&i=NjU1NTQ1Y2Y2MjBmMmMyMzA0ZGU2NDU3&t=TzJsTXdhR293VnMxRmpxVytWYUIxQUluUGdMeHB2RjUxeFVtTm5Ub2VPWT0=&h=061e1c16a85645a4b5adb906c2dcf83d&s=AVNPUEhUT0NFTkNSWVBUSVbyj4lJ0E4Q0g9dojt2up-KGFIfrQfI3fFj36Vhyj3c3Q) For more information see [Northern Ireland Multiple Deprivation Measure 2017 (NIMDM2017) | Northern Ireland Statistics and Research Agency (nisra.gov.uk)](https://eu-west-1.protection.sophos.com?d=nisra.gov.uk&u=aHR0cHM6Ly93d3cubmlzcmEuZ292LnVrL3N0YXRpc3RpY3MvZGVwcml2YXRpb24vbm9ydGhlcm4taXJlbGFuZC1tdWx0aXBsZS1kZXByaXZhdGlvbi1tZWFzdXJlLTIwMTctbmltZG0yMDE3&i=NjU1NTQ1Y2Y2MjBmMmMyMzA0ZGU2NDU3&t=SEk4K2FpNEg5NTVSK3lDZ1BmOS8xZkJ6bUViall4U2ZUdXFid3BGN1plVT0=&h=061e1c16a85645a4b5adb906c2dcf83d&s=AVNPUEhUT0NFTkNSWVBUSVbyj4lJ0E4Q0g9dojt2up-KGFIfrQfI3fFj36Vhyj3c3Q) [↑](#footnote-ref-5)
6. [Healthy workplaces: a model for action (who.int)](https://www.who.int/publications/i/item/healthy-workplaces-a-model-for-action) [↑](#footnote-ref-6)