



**Social Value
Portal**

Service Definition Cloud Software

G-Cloud 15

Social Value Portal Limited
Tintagel House, 92 Albert Embankment,
London, SE1 7TY, United Kingdom
+44 (0) 203 747 6555

Introduction

Social Value Portal is a B-Corp whose mission is to help build a Social Value Economy through progressive procurement. We see procurement as a lever for change and a means of delivering better value for money for all communities across the United Kingdom.

We do this using our cloud-based software solution designed specifically for public sector buyers across all sectors, supported by a team of CIPS procurement and delivery professionals who will not only help you meet your legal requirements but also deliver better value for money.

Our solution is cloud-based and allows public sector buyers to meet their legal requirements under the Public Services (Social Value) Act 2012 and Procurement Act 2023 in order to maximise the social value created for communities through their procurement spend. Our solution is easy to use and allows buyers to embed social value into the procurement process, to evaluate submissions, set social value targets, to monitor delivery of their commitments and to validate delivery. In addition, our solution allows buyers to interrogate supplier performance, create their own reports and build impact case studies. Our solution can be extended to include the management and delivery of Section 106 commitments through the planning process.

The solution is truly cross sector meeting the needs of all central government departments as well as local government using either the Social Value Model or the TOM System™ or a combination of both. The solution allows for the measurement of both or exclusively quantitative and/or qualitative data.

In addition, we provide a range of services that support buyers and suppliers through procurement, evaluation, contract management and reporting of the contract. Our service includes a review of supplier data quality and evidence.

We have been working alongside both local and central government procurement since 2015 and during that period we have supported over 3,000 procurements and helped unlock over £65Bn in social value including local jobs and spend, support for VCSEs and community projects and a range of environmental benefits

How do we do this?

We believe that what is measured is managed and that suppliers to the public sector need consistency to allow them to invest into community projects over the long term to deliver better value and lasting impact.

The Portal is set up to do this using either the Social Value Model or the TOM System. Both measurement solutions are supported with financial proxies if required, which are Green Book compliant and allow organisations to report their financial contribution to Ministers and Councilors in this way if they so choose. We recognise that not every organisation wants to report social value as a monetary outcome and so our system is also set up to report longer term impact.

The Social Value TOM System™ was launched in 2017 and updated it to support the Social Value Model in 2020 and again in 2024 and to comply with the Procurement Act 2023. Both the Social Value Model and the TOM System can be used within our software platform for procurement, evaluation, benefits monitoring and reporting.

The benefits of using our solution for procurement, evaluation and reporting are as follows

- Meets requirements of the Procurement Act 2023
- Allow users access to either the Social Value Model or the TOM System
- Provides a level playing field that allows both SME and bigger businesses to compete fairly
- Robust approach to evaluation scoring, reducing the risk of challenge
- Provides a consistent measurement framework
- Allows users to track benefits delivery
- Allows benchmarking and comparability.

How do we 'value' Social Value

We put a value on Social Value using financial proxies that have been developed over the past 10 years. Our proxy values provide a consistent methodology for measuring social impact whilst reflecting local contexts needs giving users and regulators numbers they can understand and trust and turning passive actions into an active force for good.

Every TOM System measure is built around a 'theory of change' model that accounts for the chain of events following an intervention. The model describes the short, medium and long-term impacts and the resulting benefits to the individual, the local community and society. This allows us to put a financial value that reflects the impact of an activities for each measure or metric to communicate the economic, social and environmental impact of the intervention.

Key objectives for the proxy models are:

- **Robustness** Consistent (and accurate) across different contexts, can easily be replicated
- **Objectivity** Relies on quantifiable data rather than personal judgment or qualitative interpretation
- **Accurate** Minimal measurement error
- **Maturity** Captures the wider and long-term effect beyond the original target group
- **Transparent** Proxy models are comprehensive, open disclosure of used data

The research and modelling process incorporates the evaluation principles defined in the HM Treasury guidelines for policy evaluations and high-standard research practice. This involves the incorporation of safety precautions to avoid the risk of 'overestimating', for example adjust for the anticipated deadweight loss of the measured results.

Each financial value consists of a series of "value blocks", which represent the different ways an activity creates Social Value in both the long and short term:

- Benefit to Society (Fiscal savings): Reduced public costs, e.g., justice, Centrelink, NDIS, Health
- Benefit to Community (Economic benefits) Increased taxes, local supply chain spend and jobs for local priority groups such as some indigenous peoples, people with disabilities, veterans, survivors of domestic violence
- Benefits to Individual (Wellbeing impacts): Health, community cohesion, family stability, pension

Benefits monitoring

The Portal is used for monitoring the delivery of the commitments (both SVM and/or TOMs) made at point of tender and confirmed during the award of the contract. Suppliers are given access to the Portal to allow them to submit their performance data according to the contractual requirements laid out by the buyer (either quarterly or monthly).

The Portal provides a range of in-built tools and dashboards that allow organisations to monitor supplier performance and to create their own social value reports.

In addition, the Portal can also be used to monitor and measure Section 106 commitments made by developers during the planning process. This may also include any wider Social Value commitments not included in the Section 106 contract.

Validation

The Portal allows simple and effective validation of delivery data including supportive evidence. All data submitted is validated to meet contract management expectations under the Procurement Act 2023.

The Community Impact Fund

Under our supplier pays model, we can offer buyers the option of a Community Impact Fund. This solution is only appropriate to buyers who choose to outsource their evaluation and contract management to SVP and agree on a minimum volume of projects. In this case we can provide additional investment to communities derived from the recycling of a portion of supplier fees to the VCFSE sector.

Membership and Services

Our Membership solutions include the following subject to contract:

- Onboarding support
- Social Value Maturity Index
- Your Social Value Framework comprising a tailored set of Social Value Measures (SVM and SRM's and/or TOM System)
- A tailored set of KPIs
- Localised proxy values
- Access to the Social Value Academy
- ITT Templates and Procurement Guidance
- Access to a digital local needs analysis tool
- Support for suppliers including premarket engagement and data management
- Geospatial mapping
- Access to evaluation training and on-line self-evaluation tool
- Access to benefits and contract monitoring tools
- Annual or quarterly Validation
- Access to dynamic modelling and benchmarking
- On-line reporting
- Ongoing Support and Training for buyers and suppliers
- Monitoring and measurement of Section 106 and wider Social Value commitments in Planning
- Community Impact Fund
- Integration with Delta eSourcing procurement platform, Proactis and whatimpact
- Social Value TOM System™ and/or Social Value Model and Account Set Up

i) Tailored Social Value Framework. Your Social Value Framework is used for procurement, evaluation, measurement, management, benchmarking and reporting. It can be tailored to you're your specific needs based on either the UK Govt. Social Value Model or the Social Value TOM System™ to reflect your organisational language and values. It can also be mapped to your Corporate Strategy or any other relevant policy drivers like NHS Core 20 plus 5

ii) Master Account. We will set up your master social value account to include the following:

- Account hierarchy
- Access to evaluation tool
- Access to contract management system
- Our impactful displays and management dashboards
- Geospatial mapping tools
- Functionality and Support to procure, evaluate, measure, manage and report on your social value

Using your tailored Social Value Framework (including the TOM System™ or the Social Value Model) buyers can use the Portal for the following tasks;

Before and during the bid

- Pre-market engagement with suppliers
- Invite suppliers to bid
- Manage online submissions
- Evaluate social value offers against a standardised and comparable format
- Management and tracking of CQs

After award

- Setting of targets and KPIs (as per Procurement Act 2023)
- Monitoring delivery against targets
- Dynamic reporting
- Performance benchmarking

You can use the Portal to measure, manage and dynamically report on your social value delivery to track progress and target action.

During all stages of the bid and reporting process, buyers will access our range of support to help with queries – from technical and social value measurement to data quality and account – in order to maximise social value delivery.

Section 106 Management for Planning

In addition to procurement, the Portal can be used to manage the delivery of any Social Value commitments made as a part of a planning permission by a development team (Section 106) – for buildings or infrastructure. Targets are set as a part of the planning process using your tailored Social Value Framework which can then be monitored throughout the construction lifecycle and through to occupation where the Section 106 commitments extend beyond occupation.

Compare social value of assets and target improvements - RESVI™

The Real Estate Social Value index (RESVI) is an on-line solution for measuring the wider impact and social value created by a building for the local community. The online tool is used for measuring, reporting and improving the Social Value generated by a real estate asset in occupation. The tool allows us to collect data from all participating firms to conduct a diagnostic, grading and social value assessment from Asset Manager, Property Managers, key Suppliers & key Occupiers.

It can be used for any government occupied building or where government has invested into capital projects

Dynamic Reporting

Following account set up, buyers and their contract managers, and suppliers will have access to real-time performance dashboards that will enable all users to track the progress against targets including evidence of delivery, via:

- Real-time data monitoring
- TOM System dashboard
- SRM dashboard
- Bespoke KPI dashboard
- Analytics suite, including benchmarking tool
- Report library, including account level and supplier level performance data and reports
- Automated project / contract status report

Data Validation

SVP provides data validation as a standard across all of our public sector contracts to ensure compliance with the Procurement Act 2023. We review data submitted by suppliers to ensure they are submitting compliant with quality standards and meeting our requirements for evidence. Data requiring improvement is flagged to the supplier for correction and they are supported to improve the quality across the contract. Validation can be offered either annually or quarterly.

Additional services:**Evaluation Service**

We provide a full bid evaluation service for buyers where they have insufficient experience or resources or wish to outsource this service. We have been delivering evaluations service since 2015 and have been involved in almost 3,000 procurements during that time. Our service includes support for the following with respect to social value submissions

- Advice on evaluation weightings and thresholds
- Evaluation
- Peer reviews
- CQ management and tracking

The service is delivered:

- a) in a professional manner with reasonable skill and care.
- b) using members of staff who, in SVP's judgement, have adequate training or experience to perform the tasks assigned to them.

SVP shall complete a Conflict Assessment prior to the commencement of any evaluation to determine if any evaluator, peer reviewer, moderator or any other individual having a part in the procurement process has a conflict. SVP shall provide the Customer with completed Conflict of Interest forms for audit trail purposes.

SVP shall supply the Evaluation Service to the Customer based on the number of bidders, contract value of the project to be evaluated and complexity within the timescales as set out in Table A.

Table A: Evaluation Service Timescales

Project Type	Contract Value	Number of bidders	Timescale to complete evaluation
Straightforward (a single lot framework, relatively low number of measures per bidder.	Up to £3,000,000	1-6	10 working days
Moderate		7-10	15 working days
Complex	Above £15,000,000	May consist of any or more of the following • 11+ bidders • Multiple lots • 2 stage (design and build) project • Contract value over £10 million • High profile project e.g. requires Treasury sign-off) • Requires SVP attendance at an external moderation meeting, including multiple moderators, over multiple meetings • Customer requires non-standard SVP evaluation process to be followed	Minimum of 20 working days (to be agreed with customer in advance of project set up and tender release)

In addition, SVP provide the following support:

- Preparation of the ITT including clauses around remedies and non-delivery.
- Evaluation of multiple bids based on agreed assessment criteria.
- Peer reviews (where required).
- Procurement and Contract Manager ongoing support with centralised training. Bespoke training where required (bespoke training may incur an additional cost) and is to be discussed with the Strategic Account Manager (SAM) for scoping and quotation.

Evaluation Training

We provide a multipart training programme for Procurement Managers/Professionals to support bringing Evaluations in-house for self-evaluation management, supported by Social Value Portals tried and tested methodology and Evaluations platform for a best practice approach.

The training consists of three modules:

1. Principles of evaluations.
2. Preparation and evaluation of Social Value submissions.
3. Hands on practice on a live client tender.
4. Key benefits:
 - Upskill your team
 - Ownership of the evaluations process, end to end
 - Data download for offline analytics
 - Delivery uploads by CSV or API

Supplier and Contract Support (post award)

We provide a full suite of services to suppliers and will ensure they are fully supported following award including a dedicated contract account and a range of support services to help them deliver on their contractual commitments. This service can be supplied even when buyers do not use the Portal for procurement.

- Set up buyer contract manager accounts and log-ins
- Set-up supplier account (winning bidder)
- Upload supplier targets as agreed during award
- Provide suppliers with access to our help centre and support throughout the contract
- Provide access to Social Value Academy
- Provide access to guidance on local needs where made available by buyer as a part of their contract
- Provide access to Social Value Maturity Index where available
- Support to suppliers to help them submit their performance against targets
- Support to member contract managers to help them understand progress to inform action
- Validate their submissions

Digital Local Needs Analysis Tool (DiLNA)

Understanding the local needs and priorities in an area is key to maximising Social Value. SVP's Digital Local Needs Analysis (DiLNA) helps commissioners, procurers, planners and suppliers to make decisions around Social Value that are driven by community needs.

The cloud-based service gives users access to hyperlocal data that helps them understand the key challenges facing an area including indices of multiple deprivation, health and wellbeing, pollution, employment, education, crime and schools performance.

DiLNA has been specifically designed to support suppliers and developers as they prepare their bids or planning submissions and includes links to local VCFSE delivery partners to ensure wider engagement across the 3rd sector

Users will get a granular report providing deep insight into a community's biggest challenges and highlighting opportunities—aligned to the Social Value TOM System™ and/or the Social Value Model—to drive better economic, social and environmental outcomes.

The Social Value Academy

We offer an e-learning solution that allows users to access online training developed by us in collaboration with you to improve understanding and to upskill colleagues and suppliers. The Social Value Academy has a range of modules for both public sector and the private sector including Social Value 101, Social Value for bidders, Social Value for the NHS and the Social Value Model.

Social Value TOM System License Only

We offer a license only version of the Social Value TOM System for public sector buyers who would like;

- Access to the full list of measures (over 100+) with live updates aligned to the Social Value Model and Standard Reporting Metrics
- Localised Proxy Values
- 10 Licenses to the Social Value Academy
- ITT Templates and Procurement Guidance
- Social Value Maturity Index tool and resource