



**Social Value
Portal**

Service Definition Cloud Support

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SOCIAL VALUE CLOUD SUPPORT – SERVICE DESCRIPTION

Our experts help you boost Social Value as a strategic priority by:

- Ensuring community needs are effectively identified and understood using our Local Needs Analysis tool. We provide up to date data and insights to help ensure needs can be addressed through targeted interventions and partnerships. A Digital Local Needs Analysis is also available, and details are available in the Cloud Software Service Definition for Social Value Portal.
- Helping local authority planners to maximise outcomes for the communities they serve by incorporating Social Value into the criteria for whether planning is awarded.
- Working with your internal stakeholders to co-create a Social Value Strategy Action Plan to implement solutions for the short, medium and long-term to maximise impact on the communities you serve.
- Embedding a suite of real estate support services for new developments, ensuring that Social Value is effectively, benchmarked, measured and reported. This includes the new Real Estate Wellbeing Calculator.
- Undertaking Social Impact Evaluations when a longer-term return on investment needs to be considered,

Evaluation Service

We provide a full bid evaluation service for buyers where they have insufficient experience or resources. We have been delivering this service since 2017, and it includes support with the following:

- (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.

1.2 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.

1.3 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

Key benefits:

1. Upskill your team
2. Ownership of the evaluations process, end to end

Local Needs Analysis (static)

Understanding the local needs and priorities in an area is key to maximising Social Value. SVP's Local Needs Analysis helps commissioners, procurers, planners and suppliers to make decisions around Social Value that are driven by community needs. Using data on deprivation, health and wellbeing, employment, education and crime (amongst other areas) we will help you get an overview of a community's biggest challenges. We will produce a granular report detailing the needs but also highlighting opportunities—aligned to the Social Value TOM System™ and/or the Social Value Model—to drive economic, social and environmental outcomes. This report is static.

Social Value in Planning Policy

Incorporating Social Value into planning policy helps local authorities maximise long-term, positive outcomes for the communities they serve. Our team helps local authority planners understand how best to do this. We have a range of services, from leveraging the Local Plan and updating Validation Requirements, to creating supporting guidance for development teams.

The planning team at SVP will work with you to create a bespoke scope of work depending on your needs and objectives around Social Value.

Social Value Strategy

Having a clear and coherent Social Value Strategy helps to ensure that there is a consistent approach to embedding, operationalising and optimising Social Value throughout your organisation. Our experts collaborate with all types of organisation to co-create a formal Social Value Strategy. We conduct interviews, facilitate workshops and draw on our in-house maturity diagnostic tool to identify strengths, gaps and opportunities to drive Social Value in your organisation. We will engage with you to create a Strategy Action Plan to implement solutions for the short, medium and long-term to maximise impact on the communities you serve.

Our strategy experts at SVP will work with you to create a bespoke scope of work depending on your needs and objectives around Social Value.

Community / Place-based Social Value Strategy

Having a clear and coherent Social Value Strategy helps to ensure that there is a consistent approach to embedding, operationalising and optimising Social Value throughout a community or place. Taking a place-based approach ensures that local needs and priorities are being proactively addressed and long-term impact is considered. We can undertake a Local Needs Analysis and community consultation and will then engage with you to identify appropriate short, medium and long-term actions that will maximise impact.

Social Value Policy

Following the Strategy work SVP can articulate your approach through a succinct Social Value Policy that can be published on your website and be included in relevant stakeholder engagement. The document can be shared with partners, suppliers, bidders, so that any Social Value activities undertaken including procurement and community activities are informed by the Policy. The Policy will be supplied as a 2-3 page Word document and will include:

- Policy aim & scope
- Overview
- Policy objectives
- TOM System
- Reporting
- Governance

It can only be undertaken if a Social Value Strategy has already been developed and signed-off.

Social Impact Evaluations

If you want to understand the social impact of a specific programme, scheme or project that includes primary data-based evaluation, secondary data-based evaluation or a hybrid. This looks at impact outside of what is already captured through the TOM System, for example, engaging directly with third sector organisations that have benefited from monetary donations. A report will be produced with clarity on the methodology used.

Embedded Resource

Hiring Embedded Resource to support management of services on our cloud software will help drive social value creation in your organisation and through your supply chain. Bringing a Social Value Portal Employee in-house adds expertise and acceleration to: cultivate strong relationships with internal and external stakeholders; inspire and encourage participation in the delivery social value goals; optimise overall social value performance. This added expertise will also help coordinate bidder commitments, contract deliverables, and influence the direction of social value delivery to key partners.

Social Value in Design

When planning capital projects, it is important to consider how to maximise Social Value through design decisions. Working with your Project Team, we will help embed Social Value at every stage of the design process to ensure that Social Value outcomes are considered early, making the implementation and delivery of activities in the future more streamlined and effective. We will feed in local needs insights, review designs and engage the team at Concept, Schematic, Detailed Design and Specification stages. We will provide Social Value recommendations at each stage using the Social Value in Design Checklist and Social Value Plan of Work which was developed by Social Value Portal in collaboration with the Social Value in Design Taskforce. We will also draw on the Real Estate Wellbeing Calculator.

Real Estate Wellbeing Calculator (REWC) Assessment

REWC uses the 'preference account of wellbeing' to understand the expected wellbeing benefits (as a pound value and ranking) of 49 'best practice' real estate attributes on local residents and workers on site. For example, accessible green spaces, renewable energy features and public gyms.

Following a nationally representative survey we have national values available, as well as values segmented by country, region, county, urban-rural classification, gender, age, income, family size, employment status, education, relationship status, and self-reported health.

REWC is intended to support decision making regarding 'what' makes a good place through wellbeing based design. REWC can be used alongside the TOM System, which helps real estate clients understand 'how' to create a good place through Social Value.

Socio-economic assessment

Our real estate team can undertake a socio-economic assessment to look at how a development might create value for the economy. For example, short-term employment, permanent employment and tax revenues. The team have developed a tool to support with estimating economic factors and forecasting indirect economic impacts. Our service includes a full report that also covers the methodology used.

Benchmarking Report (real estate)

When new real estate developments are being brought forward we can conduct an assessment to quantify the potential Social Value that could be added through your approach to the scheme, compared to a 'business as usual' scenario. Using our robust benchmarking calculator this assessment will use base and stretch targets to demonstrate the potential social and local economic value the proposed development could bring to the local area throughout the construction works and through how the scheme is ultimately managed and occupied.

Target Setting Workshop (real estate)

To take the Benchmarking Report a step further we can co-facilitate a two-hour target-setting workshop for each new development you take forward. Representatives from your project teams will be required alongside attendance from key site delivery partners (contractors, designers and facilities management providers and others) to set targets, informed by our benchmarking process, for the property lifecycle of each site. These workshops will be co-facilitated with you and planned by SVP.

Benchmarking and Insights Report

Using data we have collected from thousands of projects we are able to provide benchmarks on Social Value delivery for different industries, sizes of business and geographies. This will be valuable for incorporating Social Value into tender documents and/or contracts because we can help you understand what the appropriate Social Value Add should be for different projects.

Community Consultation

Community consultation provides a good opportunity to build on the Local Needs Analysis and engage with key stakeholders on their social value priorities. We will conduct a Social Value survey with local residents and businesses, host consultation workshops and meetings with community stakeholders to uncover the local need at each capital project site.

Social Value Planning Statement

When you are submitting a planning application for a new development it's important to include a Social Value Statement. It helps to promote the wider benefits of a scheme and is the bridge between developer, the Local Authority and the community. It sets out the Social Value strategy for the development across its full lifecycle. To have the greatest impact it must be transparent, measurable and rooted in local need. Therefore it can only be completed if the Local Needs Analysis, benchmarking, target setting, and (if relevant) community consultation have been undertaken.

Annual Social Value Report

Using validated data from the Portal, where contracted to do so, SVP can create an Annual Social Value Report highlighting the total amount of Social Value delivered by you and your suppliers or other partners. SVP will analyse reported data and write a report highlighting case studies, key Social Value delivery figures, progress against KPIs, an overview of proxy values, and framework methodology.

We require all delivery data to be uploaded and validated in the Portal at least 8 weeks prior to report drafting (as per agreed reporting period) and that you supply a selection of case studies to be included. **We have a case study template you can use to make the collection of this information easier for you, our team will then add it to the Annual report.**

Lifecycle Carbon Assessment for buildings and infrastructure

We can undertake lifecycle carbon assessments for new schemes based on live data capture to assess the embodied carbon and inform reduction opportunities for future projects.