**Scoring Social Value**

**Model Text for inclusion on Construction Related Professional Services Contracts**

**For**

**Public Sector Bodies**

**Model text for inclusion in the Specification.**

**Please ensure that you have completed areas (in grey text) that require input. If you are including a Client Priority group not in the list please contact the Social Value unit to ensure this can be included in the monitoring system.**

# SCHEDULE Click here to enter text.: SOCIAL VALUE

## Background

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

## 2.0 Social Value Delivery Plan – Open/Restricted Procedure/Competitive Procedure with Negotiation

The Supplier is required to submit the Social Value Delivery Plan included in Click here to enter text. within their tender response. This plan must set out how you will deliver the requirements in Click here to enter text. below.

The Supplier shall deliver the services in accordance with this Schedule and their submitted Social Value Delivery Plan unless otherwise agreed with the Authority, at the Authority’s discretion.

*REMOVE AS APPROPRIATE*

## 2.0 Social Value Delivery Plan – Competitive Dialogue Procedure

Tenderers should use the Social Value Delivery Plan included in Click here to enter text. to set out how they will deliver the requirements in Click here to enter text. below. Tenderers will be required to submit their completed Social Value Delivery Plan at Invitation to Submit Final Tenders Stage.

The Supplier shall deliver the services in accordance with this Schedule and their submitted Social Value Delivery Plan unless otherwise agreed with the Authority, at the Authority’s discretion.

## 3.0 Social Value

The Supplier must deliver a minimum of 100 Social Value points for every £1 million (and pro-rata) of contract value using those initiatives which have been given a social value points value. The social value initiatives which are eligible for inclusion on this contract and their allocated points are outlined in the Social Value Point Matrix at 3.1.

The Supplier may provide a mix of all eligible social value initiatives as outlined in the Social Value Point Matrix at 3.1, or may provide only one or a subset of the eligible social value initiatives, based on business need and providing the social value points target is met.

Drafting Note (REMOVE BEFORE PUBLISHING): Where the Contracting Authority wishes to cap the number of points earned for specific initiatives such as paid employment or financial donations please insert wording here to that effect. Where a minimum target has been set for example 40% of points must be delivered through Paid Employment Initiatives include a line here to state that such as ‘However, on this contract the Supplier must ensure that a minimum of 40% of the points are delivered through Paid Employment Initiatives’ Ensure if either of these are used it is replicated in the SVDP and Award Criteria.

The Supplier can deliver social value initiatives throughout the contract, based on business need, providing the overall social value requirement as outlined in this Schedule is delivered within the lifetime of the contract.

The Supplier must only count towards their Social Value points target those activities that have been delivered as a direct result of the social value requirements set out in this Schedule.

## 3.1 Social Value Points Matrix

*[delete rows as appropriate if priority groups have not been included in the contract]:*

*M - Denotes Mandatory Requirement*

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| --- | --- | --- | --- | --- |
| **THEME 1: Increasing secure employment and skills** | | | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** | **AMOUNT** | **SOCIAL VALUE POINTS**  **(pro rata)** |
| * **Our economy is globally competitive, regionally balanced and carbon-neutral** * **We have an equal and inclusive society where everyone is valued and treated with respect** * **Everyone can reach their potential** * **People want to live, work and visit here** | * 1. **Create employment, retraining and other return to work opportunities for those furthest from the labour market**   2. **Create employment opportunities particularly for those who face barriers to employment and/or who are located in deprived areas**   **1.3 Create employment and training opportunities in industries with known skills shortages or in high growth sectors** | Paid employment for people who are Long Term Unemployed | 52 person weeks FTE | 75 |
| Paid employment – priority group | 52 person weeks FTE | 90 |
| Paid Employment: Apprentice | 52 person weeks | 75 |
| Paid Employment for people who have left education or training in the past 12 months | 52 person weeks | 50 |
| Paid Employment: Student Placement/ Professional trainee | 52 person weeks FTE | 50 |
| Work placements | 4 weeks FTE | 10 |
| Work placement – priority group | 4 weeks FTE | 15 |
| Skills development and educational attainment | 8 hours of support or training | 10 |
| Skills development and educational attainment – priority group | 8 hours of support or training | 15 |
| **1.4 Support in-work progression and educational attainment in the workforce, including training schemes that address skill gaps and result in recognised qualifications, to help people to move into higher paid work by developing new skills** | Financial donations to support people within Northern Ireland who face barriers to employment to gain recognised sector related qualifications | £500 | 10 |
| **1.5 Increase the representation of disabled people in the contract workforce** | Paid employment for people with disabilities | 52 weeks FTE | 90 |
| Work placements for people with a disability | 4 weeks FTE | 15 |
| **1.6 Support disabled people to develop new skills and recognised qualifications** | Skills development and educational attainment for people with disabilities | 8 hours of support or training | 15 |
| Financial donations to support people with disabilities to gain recognised sector related qualifications | £500 | 15 |
| **1.7 Create opportunities for entrepreneurship and help new, small organisations to grow, supporting economic growth and business creation.** | Business development and knowledge sharing with a Voluntary or Community organisation or Micro Enterprise in Northern Ireland | 8 hours of support or training | 10 |

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| --- | --- | --- | --- | --- |
| **THEME 2: Building ethical and resilient supply chains** | | | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** | **AMOUNT** | **SOCIAL VALUE POINTS**  **(pro rata)** |
|  | **2.4 Create a diverse supply chain to deliver the contract including new businesses and entrepreneurs, start-ups, SMEs and VCSEs.** | Inclusion of Micro Enterprises in the contract's supply chain | Micro enterprise located in Northern Ireland | 20 |
| Inclusion of Social Enterprises in the contract's supply chain | Social Enterprise located in Northern Ireland | 30 |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **THEME 3: Delivering Zero Carbon** | | | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** | **AMOUNT** | **SOCIAL VALUE POINTS**  **(pro rata)** |
| * **We live and work sustainably – protecting the environment** * **Our children and young people have the best start in life** | **3.1 Deliver additional environmental benefits in the performance of the contract including working towards net zero greenhouse gas emissions.** | Waste and Resource Efficiencies in the delivery of the contract | 1 VCSE organisation  1 SME  1 business | 20  15  10 |
| Environmental Initiatives | 8 hours of support or improvement | 10 |

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|  | | | | |
| **THEME 4: Promoting Wellbeing** | | | | |
| **PFG OUTCOMES** | **SOCIAL VALUE INDICATOR** | **SOCIAL VALUE INITIATIVES** | **AMOUNT** | **SOCIAL VALUE POINTS**  **(pro rata)** |
| * **We all enjoy long, healthy, active lives** * **Everyone can reach their potential** * **We have a caring society that supports people throughout their lives** * **We have an equal and inclusive society where everyone is valued and treated with respect** | **4.1 Support the health and wellbeing, including physical and mental health, in the contract workforce**  **4.3 Promote equality, diversity and inclusion in the contract's workforce** | Health and Wellbeing initiatives to support employees including those working remotely on the contract. | 8 hrs of support | 10 |
| Initiatives to reduce the stigma of mental illness and increase awareness of health and well-being issues among employees and managers engaged on the Contract. | 8 hrs of support | 10 |
| **4.2 Influence staff, suppliers, customers and communities through the delivery of the contract to support health and wellbeing, including physical and mental health** | Initiatives to influence suppliers, customers and communities to support health and wellbeing, including physical and mental health. | 8 hours of support | 10 |

## 4.0 Supplier Guidance

## 4.1 Paid Employment Opportunities

The delivery of paid employment for people who face barriers to employment. 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; or
* person aged under 25 that has been unemployed for more than 26 weeks and is seeking employment;
* person aged over 25 that has been unemployed for more than 52 weeks and is seeking employment;
* people with a disability;
* student placements;
* apprentices working on the contract;
* professional trainees;
* people who meet the conditions of the Contracting Authority’s Priority Groups, as set out at clause 4.1.2 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

**4.1.2 Contracting Authority’s Priority Groups** *[remove if not appropriate or edit list as required]*

*DRAFTING NOTE (remove before publishing). The Contracting Authority may choose to target specific groups who face barriers to employment such as people who have been identified as underrepresented in the relevant industry, people from identified deprived areas relevant to the contract or other groups who help the CA to meet their priorities. Some examples are given below.*

For a person to qualify as a member of the Contracting Authority’s Priority Groups, the Contractor must ensure that they satisfy one of the following categories:

* People at risk of re-offending;
* Looked After Child/Care leaver;

Each employment opportunity must be for someone newly employed on the contract with the exception of Apprentices who can be employed on the contract at any stage of their apprenticeship.

Each employment vacancy must be notified to Jobcentre Online ([www.jobapplyni.com](http://www.jobapplyni.com)) and one or more organisations registered on the Social Value Unit website ([Find a Broker - Social Value NI](https://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.

**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;
* supported in developing soft skills relevant to the workplace (e.g. communication, teamworking, time management, problem-solving etc.);
* 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; and
* supported in undertaking training e.g. through flexible working arrangements, where practicable.

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

## 4.2 Unwaged work experience placements

The delivery of unwaged work experience placements for:

* people who who face barriers to employment and/or who are located in deprived area. This can include 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 4.1.2. *[remove if not appropriate].*

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 ([Find a Broker - Social Value NI](https://socialvalueni.org/contractors/find-a-broker/)) and/or equivalent agencies named by or agreed with the Authority for this purpose.

## 4.3 Skills development and educational attainment

The delivery of skills development and educational attainment support in areas related to the contract to a school 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 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 contract’s workforce.
* people who meet the Contracting Authority’s priority groups, as set out at 4.1.2. *[remove if not appropriate]*

This support can include vocational talks, curriculum support, careers guidance, workplace visits, mentoring or as otherwise agreed by the Authority. The Supplier shall agree the scope of activities with the Authority prior to delivery.

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

**4.4 Financial donations to support people within Northern Ireland who face barriers to employment to gain recognised sector related qualifications**

The provision of financial donations to support people within Northern Ireland who face barriers to employment to gain recognised qualifications in areas related to the sector the contract relates to. This may include, for example, people who are long-term unemployed, young people who are Not in Education, Employment or Training (NEET), people who are located in deprived areas and are new to the sector, people who are from ethnic minority communities and are new to the sector and people from an underrepresented gender group within the sector, or another group who face barriers to employment as agreed with the Authority, at the Authority’s discretion.

The financial support can include donations towards tuition fees and relevant resources (e.g. course textbooks) or as otherwise agreed by the Authority. The Supplier shall agree the scope of financial donations with the Authority prior to delivery.

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

The Supplier cannot claim social value points under this initiative for any training and qualifications provided to people working on the contract.

## 4.5 Inclusion of Social and Micro Enterprises in the contract’s supply chain

The Supplier will include social enterprises or micro businesses in Northern Ireland, 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 or micro business. Each social 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.

## 4.6 Business development and knowledge sharing

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.
* micro businesses in Northern Ireland

This may include: mentoring, training, advice or other professional voluntary services or equivalent initiatives as agreed with the Authority, at the Authority’s discretion. The Supplier shall agree the scope of activities with the Authority prior to delivery.

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

## 4.7 Waste and Resource Efficiencies in the delivery of the contract

Moving towards a more circular economy will reduce our demand for virgin materials and reduce our greenhouse gas emissions, by keeping resources in use as long as possible, extracting maximum value from them, minimizing waste and promoting resource efficiency. Companies that manage their business waste efficiently achieve significant cost and energy savings. In doing so they also make a contribution to tackling climate change. Reuse, repair, remanufacture and recycle are key components of the circular economy with the focus being to retain as much value as possible in line with the waste hierarchy.

The Supplier will take measures to actively reduce waste and transfer business waste, unwanted materials and by-products (both bio-based and technical materials) from the contract’s supply chain to be reused, repaired recycled, reprocessed and repackaged by another organisation.

Reuse and repair organisations work to do more with less, to make better use of available resources and to reduce waste while promoting new forms of employment and tackling inequality. A directory of reuse and repair organisations can be found at [www.ni-rn.com/reuse-and-repair-near-me/](http://www.ni-rn.com/reuse-and-repair-near-me/).

Invest NI’s Resource Matching Service (<https://www.investni.com/support-for-business/resource-matching-service>) provide advice and guidance to help businesses achieve resource matching solutions specific to their resource and waste management needs.

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.

## 4.8 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.

Activities may include: delivery of training to the contract workforce to promote environmental awareness in the performance of the contract; partnering/collaborating in engaging with the community in relation to the performance of the contract, to support environmental objectives; volunteering opportunities for the contract workforce, e.g. undertaking activities that encourage direct positive impact; supply chain events to raise awareness of environmental issues in relation to the contract; or equivalent initiative as agreed with the Authority, at the Authority’s discretion. The Supplier shall agree the scope of activities with the Authority prior to delivery.

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

**4.9 Health and 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 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’.[[1]](#footnote-1)

The Supplier will deliver initiatives that are designed to support the physical and mental health of employees working on the contract, including those who are working remotely. These initiatives should support employees to use personal health resources, adopt a healthier lifestyle, promote a positive psychosocial work environment and/or prevent stress at work.

Initiatives can include, for example:

* workplace wellbeing initiatives (e.g. yoga classes, meditation courses, counselling support, stress management courses etc.);
* wellbeing initiatives beyond the workplace (e.g. couple counselling, post-trauma support, etc.);
* initiatives to engage people in health interventions (e.g. smoking cessation, healthy eating, exercise, addiction treatment and support etc.); or
* equivalent initiative as agreed with the Authority, at the Authority’s discretion.

**4.10 Initiatives to influence suppliers, customers and communities to support health and wellbeing, including physical and mental health.**

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

This may include training, advice or other equivalent initiatives e.g. physical activities for adults and children in the community, actions taken to support older, disabled and vulnerable people to build stronger community networks (befriending schemes, digital inclusion clubs etc.) or equivalent initiative as agreed with the Authority, at the Authority’s discretion. Initiatives can be run in partnership with an organisation from the Voluntary, Community and Social Enterprise sector or as part of a company programme.

**4.11 Initiatives to reduce the stigma of mental illness and increase awareness of health and well-being issues among employees and managers engaged on the Contract.**

The Supplier will deliver initiatives to reduce the stigma of mental illness and increase awareness of health and well-being issues among employees and managers engaged on the Contract. These initiatives will be designed to support all employees working on the Contract, including those with mental health problems, to remain in and thrive through work.

This may include: initiatives to identify and understand issues relating to physical and mental health in the contract workforce, management training, support groups, awareness raising events or other equivalent initiatives as agreed with the Authority, at the Authority’s discretion.

# General requirements

# 5.0 Positive Action to maximise employment opportunities

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 Buy Social website ([Find a Broker - Social Value NI](https://socialvalueni.org/contractors/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.

## 6.0 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.

## 7.0 Data Protection

Where the Supplier has selected to provide paid employment opportunities for people who face barriers to employment 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 General Data Protection Regulation (GDPR) (Regulation (EU 2016/679).

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.

## 8.0 Health and Safety

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

## 9.0 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).

## 10.0 The Authority’s Support Activities

Organisations delivering employability, education and skills training are listed on the Social Value Unit website ([Find a Broker - Social Value NI](https://socialvalueni.org/contractors/find-a-broker/)) established for the purpose of helping Suppliers identify social value beneficiaries.However, this action does not comprise or imply any promise on the part of the Authority or their agents to provide suitable services. Responsibility for sourcing social value beneficiaries remains with the Supplier.

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.

## 11.0 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 consideration requirements.

## 12.0 Monitoring Information

The Supplier shall provide a completed Social Value Monitoring Report every month using the Social Value online monitoring system. The Authority retains the right to request interim reports.

The Supplier shall provide all information necessary, including obtaining it from subSuppliers 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. [Healthy workplaces: a model for action (who.int)](https://www.who.int/publications/i/item/healthy-workplaces-a-model-for-action) [↑](#footnote-ref-1)