

## Appendix 2 - Sample Invitation to Tender Wording

### 1. Social Value

#### Social Value Policy & Corporate Commitments

The Council approved the adoption of a Social Value Policy at Full Council in March 2021. The policy and supporting documentation is accessible via the following link.

[Social Value Policy March 2021 \(portsmouth.gov.uk\)](https://portsmouth.gov.uk/social-value-policy-march-2021)

Tenderers should refer to this policy and the included appendixes to understand the commitment the Council has made regarding Social Value outcomes. Tenderers are encouraged to reflect upon the ways in which their organisation may be already working towards the Council's vision.

Tenderers should then consider how they could further align future social value activities to the Council's vision on both a general organisational basis and in the form of specific commitments linked to the delivery of this specific contract.

The Council will require that the successful contractor signs up the [Armed Forces Covenant](#), ensuring as a minimum that the [Defence Employer Recognition Scheme - Bronze Standard Award](#) is achieved over the contract term.

#### Social Value Commitment & Submission Requirements

Tenderers are required to put forward their social value proposals on a quantifiable basis using the social value commitment spreadsheet provided as well as on a qualitative basis. The qualitative statement should include information on what particular commitments are being proposed, the rationale for selecting particular commitments, track record and means of evidencing delivery of the commitments and the impact to the beneficiaries of the commitments.

Tenderers are required to complete the social value commitment spreadsheet as part of their tender return. The measures set out within the spreadsheet are based upon measures outlined in the National TOM's framework (Themes, Outcomes & Measures) but have been simplified and amended to take account of existing of tenderers general organisation wide social value commitments as well as those that will be directly linked to specific contract delivery.

For further information on the National TOMs framework tenderers should use the following link - <https://socialvalueportal.com/national-toms/>

Tenderers are requested to populate the sheet showing:

- The quantifiable social value commitments currently being delivered by their organisation.

- The organisations projected commitments over the term of the contract at general organisational level.
- The commitments that would be linked directly to the delivery of the contract for development of the new cruise terminal over the contract term.

Tenderers do not need to complete each section of the spreadsheet and should only populate the rows that relate to outcomes/measures they are currently delivering against as an organisation and / or outcomes/measures that would be addressed over the term of the contract.

Responses should be based upon current delivery evidence and realistic expectations over the coming year. The Council reserve the right to investigate any individual statements provided as part of the tender submission.

Completing every stated outcome on the spreadsheet will not necessarily equate to a tenderer achieving a higher score in the evaluation process as a holistic assessment will be undertaken. A tenderer who can substantiate delivery against focused specific outcomes is likely to provide a higher level of delivery confidence than a submission which covers more areas but lacks substantiation.

Tenderers can identify additional areas not included for on the spreadsheet and should ideally state how they propose monitoring delivery of the additional outcomes on a quantifiable basis.

As stated above, tenderers are also required to submit a qualitative social value statement which provides information on:

- The social value activities that are currently being delivered at both an organisational and existing contract delivery basis
- Why particular activities have been selected and prioritised
- Monitoring and reporting structures put in place to provide substantiated quantitative information
- How the effectiveness and impact of the activities undertaken is assessed
- Proposals with supporting rationale for the development of social value activities, monitoring and impact analysis at both an organisational basis and those linked directly to delivery of the Council's contract over the contract term

### Social Value Development & Reporting Requirements

As per the Articles of Agreement, the social value commitments provided as part of a tenderers submission will be developed in partnership with the successful contractor at a post award inception meeting to maximise as far as possible the addressing of wider Portsmouth needs as well needs specific to the project.

As set out within the Articles of Agreement, the contractor will be required to report on delivery of social value commitments on an approximately quarterly basis over

the term of the contract. The update reports will need to show quantifiable progress against the social value commitments agreed.

The report will also need to provide qualitative information on what specific activities have actually been undertaken within the period, evidence which demonstrates that the activities have been undertaken including for records, photographs, etc. and importantly feedback from beneficiaries on the actual impact of the activities.

The social value commitments and quarterly reports may be used by the Council - and subject to sign off from the Council - in both project and corporate communications material.

At completion of the project a case study will be co-authored by both the Council and the Contractor which again may be used for both project and corporate reporting and communications material.

Subject to approval of the Council the Contractor may include material taken from the case study within its own communications and marketing material including for publication on websites and within applications for future contracting opportunities submitted by the Contractor where social value delivery is of relevance.

Should the Contractor fail to deliver upon the social value commitments made to a significant degree this may have an impact upon the Contractor's ability to bid for future contracting opportunities with the Council.