

The Social Value Portal

User Guidance



1. Introduction

The Social Value Portal is an online tool for monitoring, measuring and managing the tendering and delivery of social value through contracts and other business-related activities. The aim of this is to understand what value business brings to society, according to the principles of the Public Services (Social Value) Act 2012. The Social Value Portal has been set up to use a range of robust and transparent proxies chosen specifically for a project or organisations to allow the comparison of different bids as part of a tender or procurement, and to monitor the delivery of social value commitments made.

1.1. How do we measure social value?

The Social Value Portal uses the National Social Value Measurement Framework, also known as the National TOMs (Themes, Outcomes, Measures), to measure social value. The National TOMs framework was developed by the National Social Value Taskforce, a body combining both public and private sector organisations. It was the result of extensive consultation across its members and is endorsed by the Local Government Association.

The National TOMs provides a standardised social value measurement system. It comprises a series of objectively researched standalone measures that both public and private sector organisations can extend or reduce to meet their needs, without compromising the integrity of the framework (provided that a consistent methodological approach is taken).

For more information, please visit <https://socialvalueportal.com/national-toms/>

Or watch our introductory video here: <https://www.youtube.com/watch?v=SGo7gMitCDQ>

1.2. Requesting Login Credentials

If you have been requested to enter your social value data on the Social Value Portal you will need to obtain a username and password to login. To request access to a project/tender, please visit our website using the link provided in your ITT documentation.

This should be provided in the following format:

<https://socialvalueportal.force.com/supplieraccountregistration?svpprojectid=XXX-XXXX-XXXXX>

You will be required to provide the following information:

Request Access to a Tender/Contract on the Social Value Portal

Please enter your details here to request access to a specific project or tender on the Social Value Portal, in order to upload your Social Value targets for a specific project or contract.

Please ensure that you include the correct Project Reference, to ensure you are set up without delay.

Once your details are checked and approved, an account will be set up for you, and details will be sent shortly via the email address you provide. Please allow at least one working day to receive your login credentials, though in most cases it will be much quicker.

SVP Project/Tender Reference:*
e.g. SVPXXXXX, or XXX-XXXX-XXXX (ask the tender/contract manager if you have not received this)

Supplier/Respondent Details

Your Organisation: Name:*

Project/Tender Manager: First name: *

Project/Tender Manager: Last name: *

Project/Tender Manager: Email Address: * (all correspondence from the Social Value Portal will be directed to this address)

Organisation Size: *

Micro (<10 employees, <£2m turnover) ▼

Sector: *

Private ▼

Invoicing Details

The successful supplier for this project will be invoiced by the Social Value Portal, according to the terms of the Tender Agreement. Please contact the Procurement Manager for more details.

Invoicing Contact Details

Invoicing Email Address:*

Invoicing Phone:

Invoicing Address Details

Street:*

City:*

Postcode:*

Country:*

Invoicing Requirements

Please describe any special invoicing requirements (e.g. PO number required, invoicing portal registration required, alternate organisation billing name)

I have read and agree to the Social Value Portal Terms and Conditions and [Privacy Policy](#).

You can find out the latest on Social Value best practice, client case studies, and industry news in our monthly newsletter. Please click here if you would like to receive this.

[Request Access to Project](#)

*Please enter the details of the person who will be using the Social Value Portal. All correspondence will be sent through the email address entered here. You may find a copy of our Privacy Policy at <http://socialvalueportal.com/privacy-policy/>.

Once you have submitted your request, it will be reviewed for approval by the Social Value Portal support team within **one working day**. We suggest you submit your registration at least five working days prior to the submission deadline, to allow enough time to edit, review and submit your response.

If you do not already have Social Value Portal login credentials, you will be sent an email containing your username and a link to set up your password.

If you already have Social Value Portal login credentials from previous projects/tenders, you will be sent an email confirming access to the new project/tender as requested.

Please note:

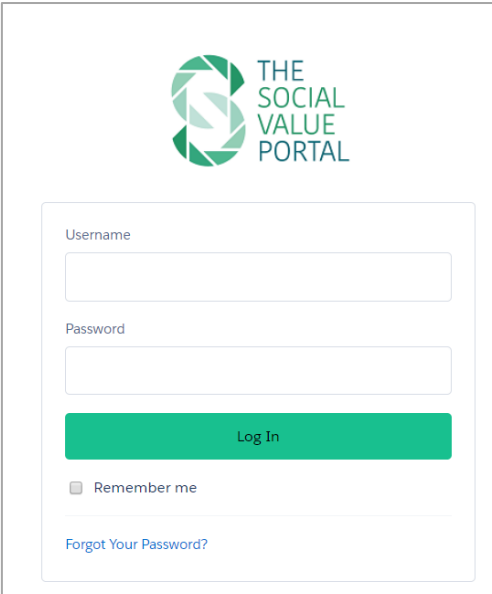
- The password setup link will expire within **48 hours** of being sent; if you need a new password setup link, please email support@socialvalueportal.com or select '**forgot password**' on the portal
- If you do not receive a password setup email, please check your spam/junk mail folder
- Your username will be in the format: **firstname.lastname@socialvalueportal.com**

2. Logging in

To log in to your account, please navigate to either:

- <https://socialvalueportal.force.com/login>

You can find this link on the Social Value Portal website, in the menu under Login/Register.

The image shows a login form for 'THE SOCIAL VALUE PORTAL'. At the top left is the logo, which consists of a green circular icon with a stylized 'S' and the text 'THE SOCIAL VALUE PORTAL' to its right. Below the logo is a white rectangular box containing the login fields. It has a 'Username' label above a text input field, a 'Password' label above another text input field, a green 'Log In' button, a checkbox labeled 'Remember me', and a blue link labeled 'Forgot Your Password?'.

Please note:

To ensure the best view of the portal, please use a modern browser ideally with the latest versions. Older browsers may not display dashboards and reports correctly.

2.1. Forgotten password

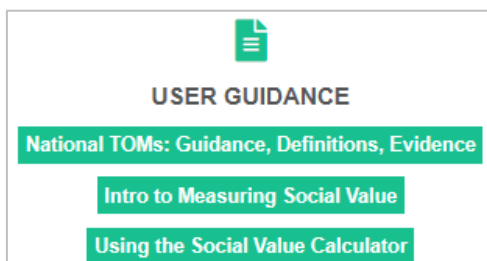
To request a password reset, please click on the 'Forgot Your Password' link on the login page, or go to: <https://socialvalueportal.force.com/secur/forgotpassword.jsp>

After you have received the reset link, please set up your new password using your Social Value Portal username, in the format *firstname.lastname@socialvalueportal.com*

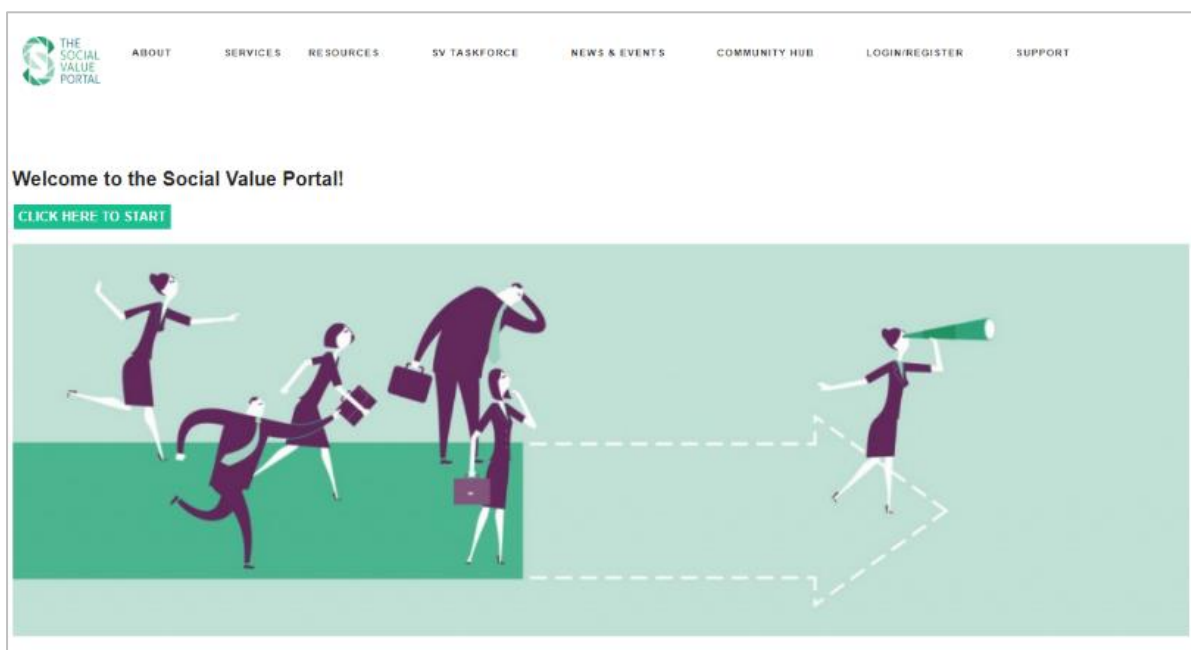
Alternatively, get in touch with the Social Value Portal team at support@socialvalueportal.com to request a password reset. A new password setup email will be sent to your registered email address.

3. Start Page

Once you have logged in, you will arrive at the Start Page. Up to date versions of this *User Guidance* document along with *National TOMs: Guidance, Definitions, Evidence* and other resources will be available to download on this page; please check back regularly to ensure you have the latest version.

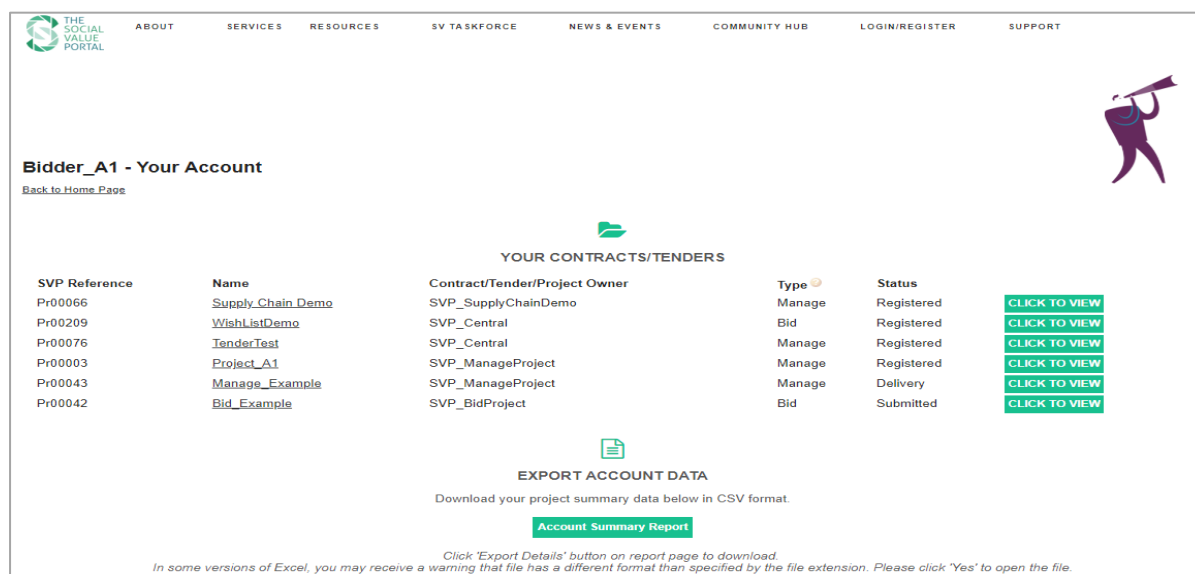


To view your account, press **CLICK HERE TO START**.



4. Your account

The 'Your Account' page displays all projects¹/tenders that you are registered for.



Bidder_A1 - Your Account
[Back to Home Page](#)

YOUR CONTRACTS/TENDERS

SVP Reference	Name	Contract/Tender/Project Owner	Type	Status	
Pr00066	Supply Chain Demo	SVP_SupplyChainDemo	Manage	Registered	CLICK TO VIEW
Pr00209	WishListDemo	SVP_Central	Bid	Registered	CLICK TO VIEW
Pr00076	TenderTest	SVP_Central	Manage	Registered	CLICK TO VIEW
Pr00003	Project_A1	SVP_ManageProject	Manage	Registered	CLICK TO VIEW
Pr00043	Manage_Example	SVP_ManageProject	Manage	Delivery	CLICK TO VIEW
Pr00042	Bid_Example	SVP_BidProject	Bid	Submitted	CLICK TO VIEW

EXPORT ACCOUNT DATA
 Download your project summary data below in CSV format.
[Account Summary Report](#)

Click 'Export Details' button on report page to download.
 In some versions of Excel, you may receive a warning that file has a different format than specified by the file extension. Please click 'Yes' to open the file.

4.1. Project List

All projects/tenders you have registered for are displayed on the 'Your Account' page. Details include:

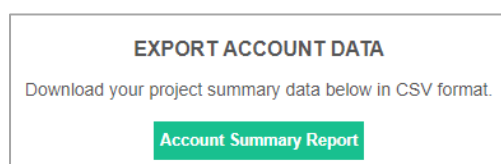
- **SVP Project reference (SVPXXXX)** – please quote this reference when contacting the Social Value Portal
- **Project name**
- **Project owner**
- **Project type:**
 - **Bid:** setting commitments or target social value only
 - **Measure:** monitoring the delivery of social value retrospectively
 - **Manage:** setting commitments and monitoring delivery against targets
- **Status** of your Social Value response:
 - **Registered:** Account registered – no targets submitted, not monitoring delivery
 - **Submitted:** Targets/commitments submitted
 - **Delivery:** Monitoring delivery / contract management

To enter or edit your Social Value responses for a specific project/tender, please click 'Name' or the 'Click to View' button.

¹ All project types including bids, tenders, frameworks, contracts, etc. are included in the project list

4.2. Download Account Summary

To download a summary report of all the projects/tenders you are registered for on the Social Value Portal, please click 'Account Summary Report' > 'Export details' > select format of report (.csv or excel) > click 'Done'.



The account summary report includes the following data:

- SVP project reference
- Project name
- Project owner
- Project type
- Contract value
- Target social value (£)
- Target % SVA ($\frac{\text{target social value}}{\text{contract value}}$)
- Actual social value (£)
- Actual % SVA delivered ($\frac{\text{actual social value}}{\text{contract value}}$)
- % progress against target % SVA
- Submission status

Please note:

- You may receive the following warning when opening the Excel file:

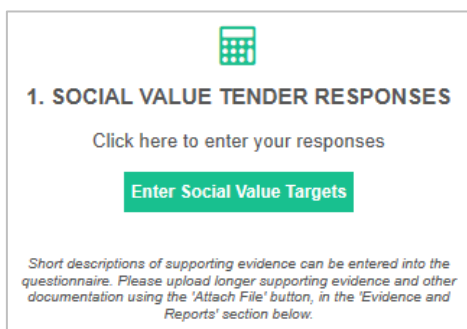
'The file format and extension of [your filename.xls] don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?'

If you receive this message, please press 'Yes'. The message is triggered when the .htm file generated by the Social Value Portal is opened as an .xls file and is **not** a cause for concern.

5. Your Social Value submission

Your Social Value Portal account allows you to enter and edit your target/actual Social Values and upload evidence to support your response. Target values are entered during the bid phase; actual values are entered during the delivery phase.

To complete your social value submission, navigate to the Social Value Calculator by selecting ‘Click to view’ > ‘Enter Social Value Targets’. This will open the calculator page where your responses will be entered (see section 5.1).



If you wish to view/download a copy of all questions included within the Social Value Calculator for your specific project/tender, select ‘View/Download Social Value TOMs’. The questions can be downloaded in PDF or Excel format.



5.1. Enter your contract value


Returning to the project/tender page, you are required to enter your ‘fee/contract value/bid price’. This value should be equal to that provided within your overall price/qualitative submission.

If you have questions regarding how to complete this field, please contact the procurement or contract manager for the project.

Enter the value in the ‘Contract Value’ box and press ‘Save’.



5.2. Entering your target social value responses (quantitative)

Question	Unit	Target x Proxy = Subtotal	Description
 <input type="button" value="Close"/> <input type="button" value="Save and Close"/> <input type="button" value="Save and Calculate"/> <input type="button" value="Print Page"/> 			
THEME: Safer and stronger communities. OUTCOME: All Lambeth communities feel they are valued			
MANDATORY 1.1 MANDATORY. No. of new volunteering opportunities created in Lambeth as a result of the contract (No. of hours and describe how you would like to contribute) Further Guidance	hrs	<input type="text" value="100.00"/> x £17.00 = £1,700	<input type="text"/> Add/View Attachments (0)
THEME: Safer and stronger communities. OUTCOME: People are healthier, for longer			
1.2 Support to be provided to improve social connectedness and reduce loneliness and isolation among vulnerable residents in Lambeth. Identify no. of people to be supported Further Guidance	no.	<input type="text" value="1.00"/> x £2407.00 = £2,407	<input type="text"/> Add/View Attachments (0)

To open the Social Value Calculator, click 'Enter Social Value Targets'. This will display all questions relating to your project/tender, organised by Theme and Outcome.

Each question includes a social value Measure, a specified unit of measurement, the social value proxy associated with each measure, and a description/evidence box. Any mandatory questions will be marked ***MANDATORY***.

5.2.1. Units

Please note the specified unit of measurement associated with each question. It is important that the correct units are used for each social value response, to ensure accurate calculation of social value.

5.2.2. Targets

Please enter social value targets for each measure you will deliver during the contract, ensuring that you read the question carefully and understand the units required by each measure. Bidders are **not** required to enter targets against every measure listed on the Social Value calculator and should only enter targets against the measures that are relevant to your delivery capabilities and that you have capacity to deliver on the contract.

5.2.3. Proxy values

Where a proxy social value has been linked to a measure, the calculation and resulting Social Value Add (£SVA) is shown alongside the target. More information on understanding proxy values is available to download from our website: <http://socialvalueportal.com/national-toms/>

5.2.4. Description and supporting evidence

A text box is provided alongside each measure to allow Bidders to include a description of how they will deliver the measure. If you wish to upload a longer response than the description box allows or provide supporting documentation or evidence, you may upload this as an attachment. Click 'Attach a File' to open the attachment pop-up window and follow the instructions to upload your attachment.

Descriptions should be provided for every target response. Please note that any target social values that do not include a clear description or supporting evidence may be discounted at evaluation stage.

5.2.5. Multiple reporting periods

If the contract duration is more than 1 year, you may be required to enter targets across multiple reporting periods, to enable effective contract management for the duration of the project.

If more than one reporting period has been defined, multiple data entry fields will be displayed on the Social Value calculator, indicated by the end date of each period. You will be required to enter targets to demonstrate what you expect to deliver during each year of the contract.


Please note:

- You can calculate your Target Social Value at any time by pressing ‘Save and Calculate’. The updated Social Value will appear at the top of the page. When you have finished editing your responses, press ‘Save and Close’ to recalculate and return to the submission page.
- Pressing ‘Close’ will return you to the submission page **without saving your changes**.
- Pressing ‘Print Page’ will open your browser print dialogue.
- Your session will timeout after 2 hours of inactivity. Please ensure that you press ‘Save and Calculate’ regularly to avoid losing any data. After 30 minutes of inactivity, a pop-up will display to remind you to save your data.

5.3. Uploading your method statement (qualitative)

To upload your social value method statement, please return to the submission page and scroll down to the *Evidence, Reports & Attachments* section. Please upload your social value method statement as an attachment, along with any additional supporting information relevant to your social value submission.

Note that a full list of the attachments you have provided for specific questions/target social value responses will also be listed here.



EVIDENCE, REPORTS & ATTACHMENTS

Files may be attached to this Social Value Record as general evidence, or to specific Answers. Use the 'Attach File' button below to attach a general file (e.g. Method Statement), or attach files to a specific Answer using the 'View/Add Attachments' link on the questionnaire data entry page.

Total No. of Attachments and Reports:
3

General Evidence, Method Statements, and Reports
[New Note](#) [Attach File](#) [View All](#)

Action	Type	Title	Last Modified	Created By
Edit View Del	Attachment	Supply_Chain_Demo - France - SVP_DemoQ - 02-07-2019 - Actuals.pdf	02/07/2019 10:38	

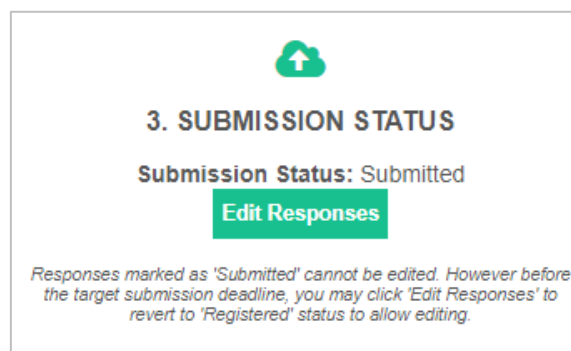
Answer Attachments

Reference	SV_Attachment Name	Description	View
1	Delivery strategy for volunteering - France.docx		View
7	Career workshops - France.docx		View

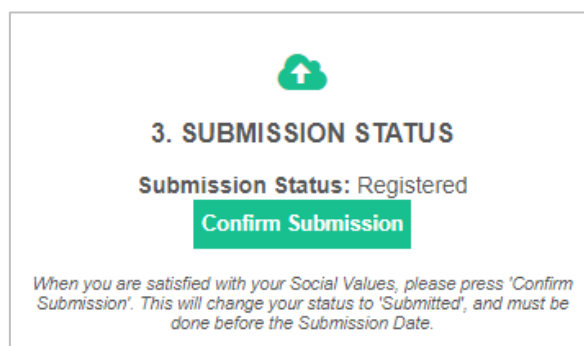
5.4. Submitting your Social Value response

5.4.1. Bid projects

Once you are ready to submit your social value responses, click *'Confirm Submission'*. This indicates that the responses are ready for submission. Please note that you are able to edit your social value responses at any time up until the submission deadline by clicking *'Edit Responses'*.



You must submit your Social Value Responses before the submission deadline. The submission deadline (date/time) is displayed on the submission page. In most cases this is the same deadline as for the procurement as a whole – please check with your procurement manager if you have any queries related to the deadline.



5.5. Print PDF report for download

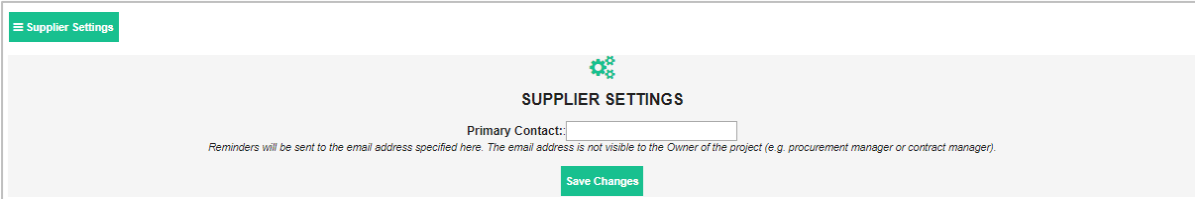
If you would like to create a PDF report detailing your Social Value responses against each question, use the *'Print Social Values to PDF'* button. A report will be generated and stored in the *'Evidence and Reports'* section. To open the report in your browser, click *'View'*.



6. Changing the primary contact on your account

By default, the primary contact associated with the project/tender will be the email address used when registering for the Social Value Portal. Any notifications related to the project/tender will be sent to this email address.

If you wish to change the primary contact (or delete it if you do not wish to receive notifications), please open the 'Supplier Settings' dialogue shown below. If required, you can set up a different primary contact email address for each project you have access to.



Please note:

- The email address listed in the Primary Contact field will only be used for notifications or reminders for the Social Value record in question and will not be visible to the Project Owner (Client) account.
- Email notifications sent to the primary contact will be limited to the following:
 - Notification on the creation of a Social Value Record for a Project
 - 2-week reminder prior to all key project dates
 - 1-week reminder prior to all key project dates
 - 1-day reminder prior to all key project dates
 - Reminders from the Project Owner

7. Account deactivation / reactivation

The free user license that you have received to enter your social value responses is linked to a specific project(s)/tender(s). At the end of the tender period unsuccessful bidders' accounts will be deactivated, and your data archived. The successful bidder's account will remain active for the duration of the project, subject to the contract management fee stipulated within the tender documents. After the project has concluded (i.e. at contract completion) this account will also be deactivated and your data archived.

All data submitted to the Social Value Portal is available on request. Please contact support@socialvalueportal.com to request a copy of your data.

If your organisation is required to complete future social value assessments through the Social Value Portal, you will be able to reactivate your account. Please visit the Social Value Portal website and follow the registration process outlined in section 1.2 of this document, using your new SVP reference code or link.

Please note:

- If you have multiple projects/tenders active on your account, your account will only be deactivated once **all** projects/tenders have been completed.

8. Upgrading your account

The free Social Value Portal user account you receive when requested to register on behalf of another organisation allows you to upload data on the specified projects/tenders for that organisation. This user account allows you to view the measures set by your client organisation(s) to monitor and manage the delivery of Social Value on their projects.

8.1. Benefits of SVP membership

We offer a range of services and solutions that may be of interest as you further develop your approach to measuring and reporting social value for your own organisation. We can help identify and measure the additional Social Value delivered through your business activities in terms that are meaningful to your customers.

Our key services are as follows:

1. Project management and delivery
2. Impact reporting – understanding your social value impact at project and corporate level
3. Procurement and tender support
4. Supply chain measurement
5. Workshops and training
6. Market and community analysis

Please get in touch with info@socialvalueportal.com to discuss upgrading your membership.

9. Help and support

For questions regarding your project or tender submission, such as clarifications or key dates and deadlines, please get in touch with your procurement or contract manager directly.

For technical issues or queries specifically relating to the use of the Social Value Portal, you can contact our support team in the following ways:

- Email support@socialvalueportal.com
- Use the online contact form – you can find the link at the bottom of each page on the Social Value Portal, or visit: https://socialvalueportal.force.com/VF_Help

Our support team will respond to your query as quickly as possible. Please allow up to one working day for a response.