

Checklist



# Social Value Bid Audit: Pitfalls & Fixes Checklist

A Diagnostic Gatekeeping Tool for Bid,  
Proposal, and Capture Teams

# Document Purpose & Instructions

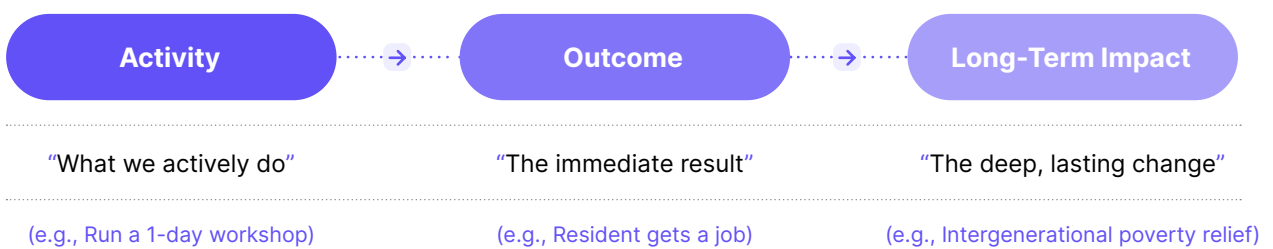
In modern public procurement, social value often accounts for 10% to 30% of the overall tender evaluation score. Because commercial pricing and technical quality are frequently highly matched among top-tier bidders, your social value response is often the deciding factor that wins or loses the bid.

## How to Use This Checklist

1. **Draft:** Complete your first draft of the social value narrative.
2. **Review:** Conduct a review panel using this document as an objective grading sheet.
3. **Verify:** Check off each box only when your submission meets the rigorous criteria outlined under "The Practical Fix".

## The Core Transformation: Moving from Activity to Impact

Before auditing individual pitfalls, evaluate your entire submission against this foundational sequence of change:



# The 5 Critical Pitfalls & Diagnostic Checks

## Pitfall 1: The Generic “Copy-Paste” Platitude

**The Mistake:** Using boilerplate corporate social responsibility language that lacks concrete localized commitments.

### Example

**“We are deeply committed to supporting the local community, preserving the environment, and leaving a lasting, positive legacy.”**

### The Evaluator’s Reaction: **Zero marks.**

Public sector evaluators are legally bound to grade only what is written and contractually bound to this specific procurement. Generic claims cannot be scored.

### The Practical Fix:

Anchor every statement within a strict Who-What-When-How framework.

### Diagnostic Audit Checklist:



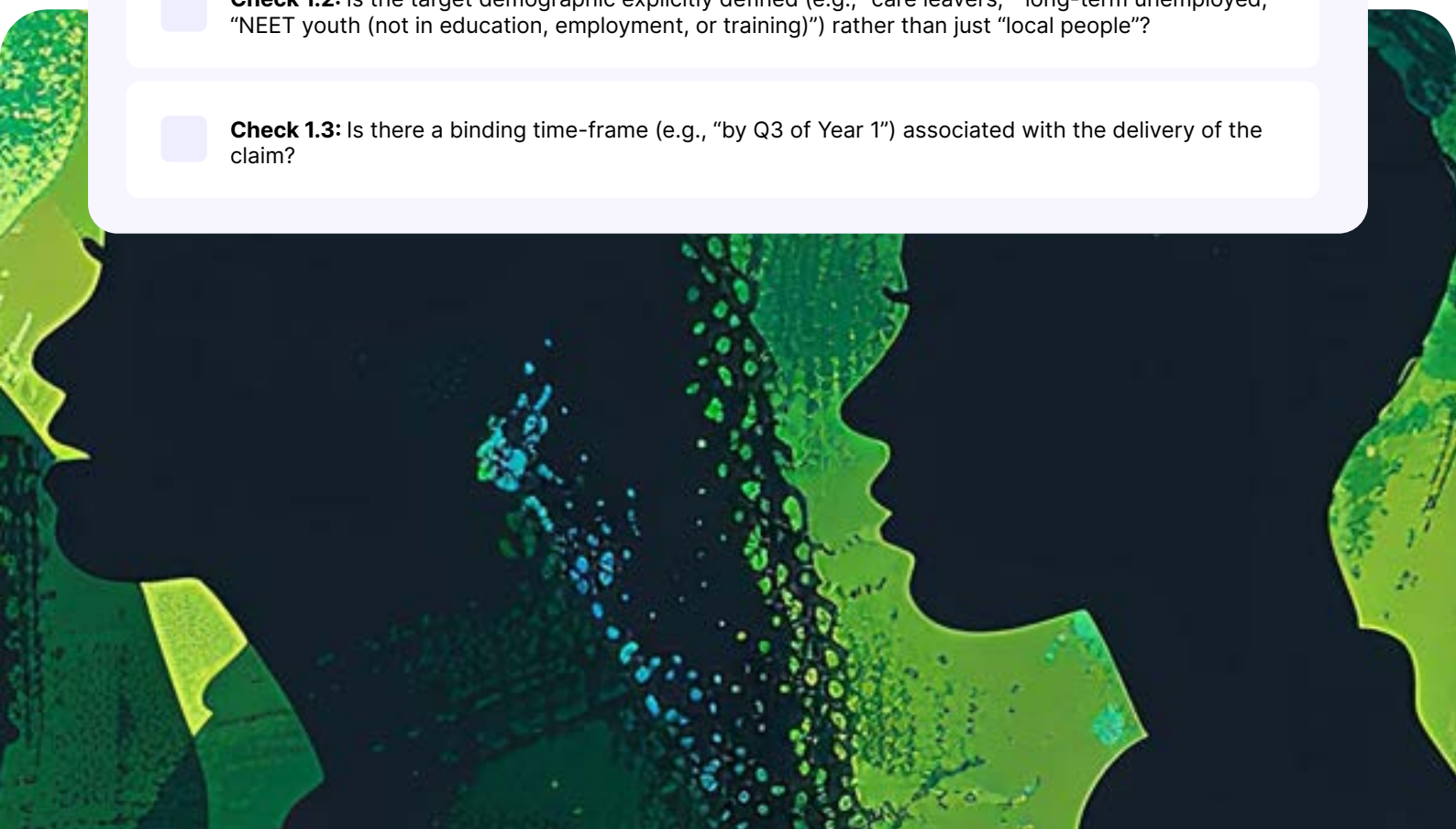
**Check 1.1:** Does the narrative name the specific local borough, town, or community region of the buying authority?



**Check 1.2:** Is the target demographic explicitly defined (e.g., “care leavers,” “long-term unemployed,” “NEET youth (not in education, employment, or training)”) rather than just “local people”?



**Check 1.3:** Is there a binding time-frame (e.g., “by Q3 of Year 1”) associated with the delivery of the claim?



## Pitfall 2: Confusing “Activities” with “Outcomes”

**The Mistake:** Framing your narrative around your team’s internal actions, hours spent, or events hosted, rather than the real-world changes that occur because of those actions.

### Example

**“Our team will dedicate 24 staff volunteering days to assist local community groups.”**

#### The Evaluator’s Reaction: **Low marks.**

Logging volunteering hours or hosting a workshop is simply an output (the administrative mechanism). Evaluators want to know what actually changed in a resident’s life because you were there.

#### The Practical Fix:

Rephrase every output to document its downstream structural impact.

### Diagnostic Audit Checklist:

- Check 2.1:** Have we audited all occurrences of the word “impact” to verify we aren’t using it interchangeably with “activity”?
- Check 2.2:** Does every described activity link directly to a specific, quantified outcome?
- Check 2.3:** Does the narrative answer the fundamental evaluator question: “What changes for someone because you are there?”

### Case in Point (The Bookkeeping Shift):

#### Weak Output-Focused:

“Our finance team will spend 24 volunteering days assisting a local charity with their books.”

**Strong Impact-Focused:** “Our professional finance team will deploy for 24 volunteering hours to restructure a struggling local charity’s accounting system. This direct intervention will uncover £24,000 in structural VAT savings annually, permanently securing the charity’s local community hub.”

## Pitfall 3: The Statistical Mirage (Overpromising)

**The Mistake:** Arbitrarily picking high-value TOMs (Themes, Outcomes, and Measures) or HACT proxy metrics to boost the visual value of the bid, without verifying operational delivery capacity.

### Example

**Promising to generate £35 million in social value on a £20 million core contract.**

#### The Evaluator's Reaction:

**Immediate disqualification or score reduction to zero.**

Evaluators are seasoned professionals who easily spot unrealistic volume claims. Overpromising indicates high delivery risk and instantly destroys supplier credibility.

#### The Practical Fix:

Anchor your metrics in empirical reality and target high-quality depth rather than bulk volumes.

#### Diagnostic Audit Checklist:

- Check 3.1:** Are our total projected social value metrics strictly calibrated to land between **10% and 20% of the core contract value**?
- Check 3.2:** Have we prioritized quality over quantity? (e.g., committing to 5 high-tier, fully-funded degree apprenticeships will consistently outscore promising 50 low-level, unverified training certificates).
- Check 3.1:** Have we factored the direct financial cost of these commitments into our primary contract delivery budget?



## Pitfall 4: Parachuting In (The “Not Invented Here” Syndrome)

**The Mistake:** Designing a “shiny” social project in a geographic vacuum, completely detached from the existing local support networks already operating on the ground.

### Example

**Proposing to build an independent job training platform in a borough that already runs three established employment hubs.**

### The Evaluator’s Reaction: **Low Marks.**

This signals that the supplier did not research the local ecosystem. Evaluators often work closely with local charities and instantly penalize duplicate initiatives.

### The Practical Fix:

Partner with established Voluntary, Community, and Social Enterprise (VCSE) organizations already embedded in the community.

### Diagnostic Audit Checklist:

- Check 4.1:** Have we studied the buying authority’s specific Corporate Plan, Local Plan, or Joint Strategic Needs Assessment (JSNA) to align with their declared local priorities?
- Check 4.2:** Does our response explicitly name local colleges, training providers, or VCSE partners with whom we have pre-agreed agreements?
- Check 4.3:** Does our narrative actively avoid duplicating existing local infrastructure?



## Pitfall 5: Blind Reliance on Generative AI Templates

**The Mistake:** Copying and pasting generic responses generated by LLMs without verifying, localizing, or stress-testing the details.

### Example

**Relying on AI to generate standard text about “promoting diversity and local growth.”**

#### **The Evaluator’s Reaction: Mediocre scores.**

AI-generated text excels at sounding professional but lacks local precision, real-world partnerships, and verified execution frameworks. Human evaluators spot the lack of operational authenticity immediately.

#### **The Practical Fix:**

Use AI exclusively to refine syntax and manage word limits after human bid experts have built the core localized strategy.

### Diagnostic Audit Checklist:

- Check 5.1:** Has every single generic statement been removed and replaced with a localized, verifiable proof point?
- Check 5.2:** Is there a **named individual** in our organization who is directly accountable for monitoring and reporting these metrics post-award?
- Check 4.3:** Have we outlined our exact data tracking and governance framework (e.g., using the Social Value Portal or custom SROI trackers)?



# Quick-Reference Guide: From Pitch to Proof

Use this side-by-side transition table during your storyboarding phase to quickly upgrade weak narrative elements:

Weak Narrative (Activities & Platitudes)	Strong Narrative (Outcomes & Verifiable Impact)
"We will offer work experience placements under this contract to support local schools."	"We will partner with <b>Chingford High School</b> to deliver <b>four structured 2-week work placements</b> specifically for Year 10 students from low-income households, mapping paths to career entry."
"We care about the mental wellbeing of the community and will fund support initiatives."	"We will provide <b>£12,000 in funding</b> to secure the operational costs of the ' <b>Door to Store</b> ' <b>community bus service</b> , directly relieving isolation for <b>85 vulnerable, elderly residents</b> ."
"We are an environmentally conscious firm committed to driving net-zero outcomes."	"We will eliminate <b>12.4 tonnes of CO2e</b> under this contract by utilizing <b>100% electric logistics vehicles</b> for all site deliveries and embedding Scope 1 and 2 tracking via our supply chain partners."

## Pre-Submission Gatekeeper Sign-Off

Before hitting "Submit" on the procurement portal, ensure you can check off this final confirmation:

**Our commitments are realistic:**

Total social value claims represent **10-20%** of the contract value.

**Our delivery is partner-backed:**

We have named localized VCSEs, colleges, or community groups with whom we have active contact.

**Our governance is clear:**

We have documented exactly how we will track, measure, and audit our metrics throughout the contract lifecycle.