

Surrey Social Value Marketplace User Manual

THIS WEBSITE IS MANAGED BY SURREY
COUNTY COUNCIL

Please ensure you also read our Terms and
Privacy Policy.

If you would like to report an issue with this
document, please email the Administrator:
social.value@surreycc.gov.uk

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The Social Value Marketplace

Connecting, Enabling and Empowering our Communities

1. Introduction

Welcome to the Surrey County Council (SCC) Social Value Marketplace (Marketplace). The Marketplace is co-designed by public, private and social sector organisations that are based in or deliver services within the county. This guide has been developed to outline how you can use the Marketplace to support our local communities.

Our Vision

Our vision is for the public, private and social sectors in Surrey to work together so we can combine our efforts and resources and collectively use these to improve the social, economic and environmental wellbeing of our residents and local communities.

Why was the Marketplace created?

The Marketplace was created to help us achieve our vision by:

1. Enabling the sharing of resources for the benefit of our residents and local communities
 - Organisations working in local communities can request support and resources based on the real needs of residents in a local area.
 - Organisations that want to help can understand what communities need, where they need it and when they need it.

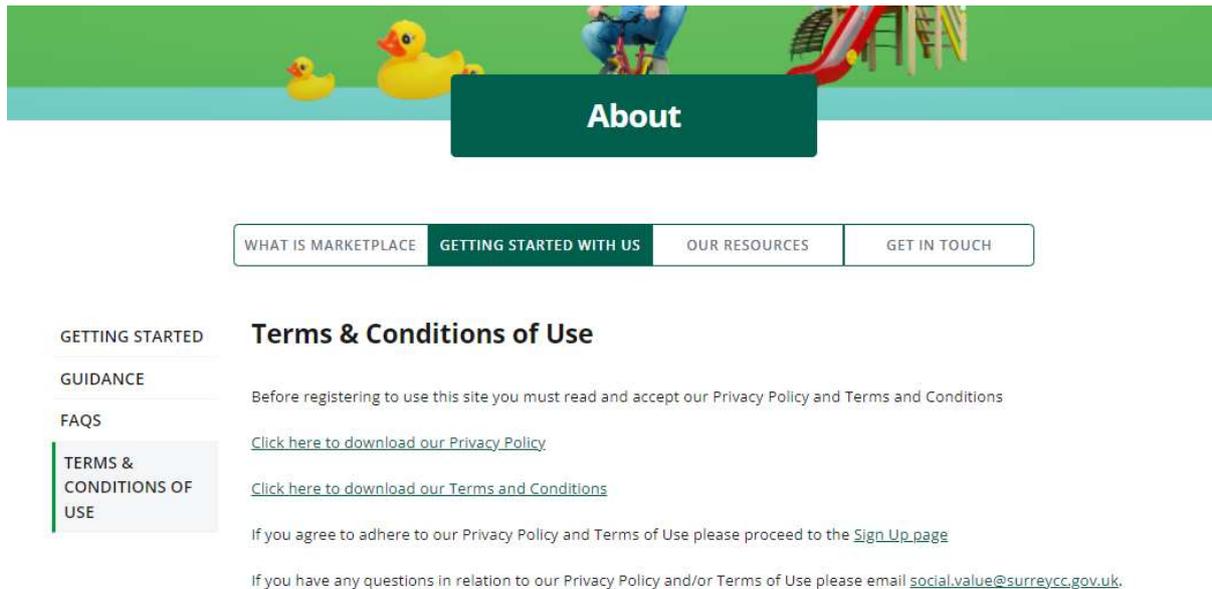
2. Encouraging partnership working and collaboration across the public, private and social sectors
 - Organisations can create a profile and provide information about the services they provide.
 - Organisations can connect, communicate with and support each other if they are working towards a common social, economic or environmental outcome.

3. Securing additional value from public sector spending through the Public Services (Social Value) Act 2012.
 - Suppliers can use the Marketplace to identify local need that is within their capacity and capability to deliver.

2. Register to Use the Marketplace

2.1. To use the Marketplace, you must register your organisation. Before registering you must review the **Terms and Conditions** and **Privacy Policy**. To view the terms and conditions you can:

- a) Click “**About**” on the main task bar at the top of the page
- b) Click “**Getting Started with Us**”
- c) Click “**Terms and Conditions of Use**”



2.2. If you are willing to adhere to the terms and conditions of use you can continue with the registration process.

- a) Click “**Sign Up**” on the main task bar at the top of the page
- b) Type in the required information
 - Organisation Name (Please enter the correct and full name of your organisation)
 - Your first name and surname
 - Organisation email address or your contact email if you have been nominated to represent your organisation. Please note this is the email address others will use to contact you.
 - Create and confirm your password. (Please ensure you use a password that is not known to any other individual)
- c) Tick the box to confirm you agree to the Terms of Use and Privacy Policy

(See picture below)

[LOG IN](#) [CREATE ACCOUNT](#)

Sign Up

Share requests and offers with the right people

Organisation Information

Organisation Name

Account Information

First Name Surname

Email Address

Password

Confirm Password

[View Terms & Conditions and Privacy Terms](#)

I agree to the Terms & Conditions and Privacy Terms

SIGN UP

2.3. To avoid duplication only one profile should be set up for each organisation, however there can be multiple user accounts attached to the organisation profile.

- a) If you are the person setting up the account, you will be regarded as the ‘primary user’. As the primary user you will be able to invite other team members from your organisation to join the Marketplace once your account has been approved.
- b) If someone in your organisation has set up an account, when you join the Marketplace and enter your organisations name you will receive a message stating that “an organisation with that name already exists”, and you will be given the option to join that organisation as a secondary user.

(See picture below)

[The Marketplace](#) [About](#) [SIGN IN](#)

Organisation Information

Organisation Name

An organisation with that name already exists. If you continue to sign up with this, then you will join that organisation after your account has been approved.

2.4. When you click “**Sign Up**” you will receive confirmation that your account has been created. Your account will need to be approved by the administrator and you will be notified by email when this has been completed.

(See picture below)

Log In

Your account has been created.
Your account will need to be approved
before you can login. You will be notified
by email when this is complete.

Email Address

Password

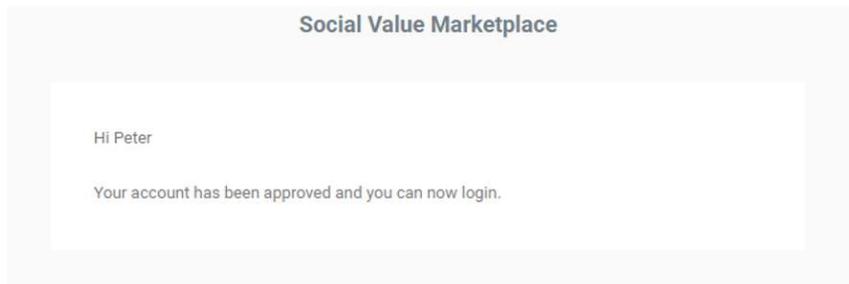
[Forgot your password?](#)

LOG IN

Please ensure you allow a minimum of 72 hours for this process.

3. Creating your Organisation Profile

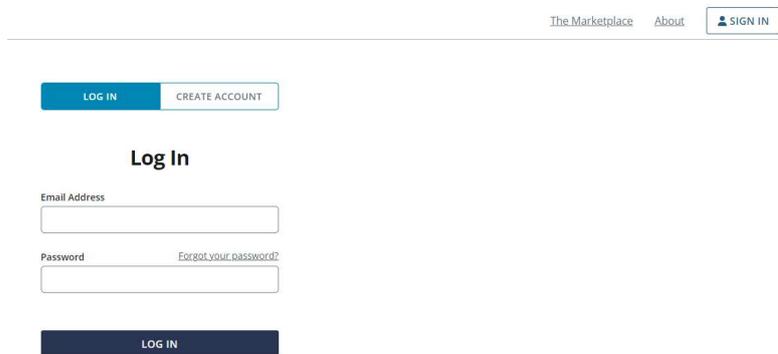
- 3.1. When your account has been approved you will receive an email informing you that you can log in and access your account.



- 3.2. Click the link in the email or enter the following address in your browser <https://socialvalue.supplytosurrey.co.uk/about/>.

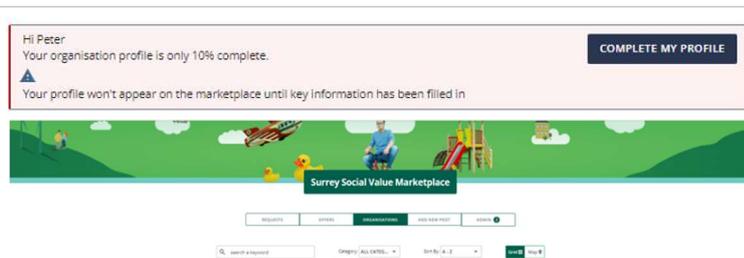
- 3.3. Click “**Sign In**” at the top of the page on the main task bar and enter your email and password. You can reset your password at any time by clicking “**forgot your password?**”

(See picture below)



- 3.4. When you log in for the first time you will see a message on the top of the page informing you that you need to complete the key information in your organisation’s profile before your organisation will appear on the “**Organisations**” page of the Marketplace.

(See picture below)

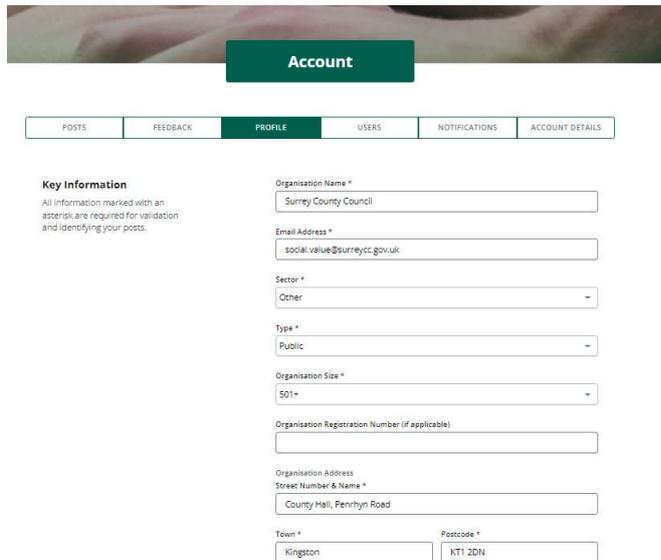


3.5. To access / complete your profile you can either:

- a) Click the **“Complete My Profile”** button in the message box at the top of the page below the main task bar, or
- b) Click **“Account”** on the main task bar at the top of the page, then click **“Profile”**

3.6. Enter the Key Information required. This information is required to validate your location and identify your posts.

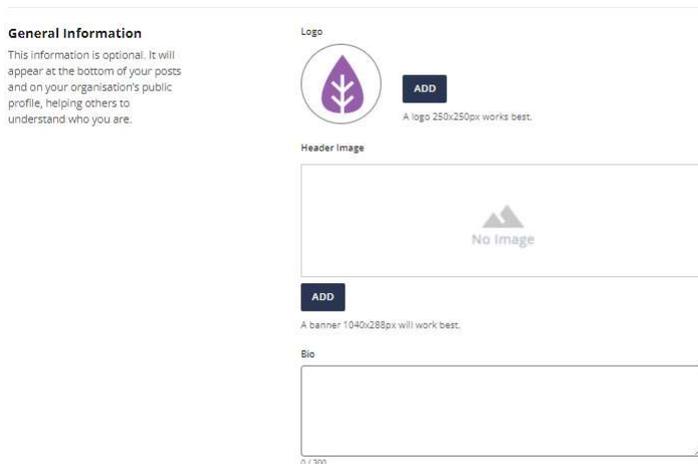
(See picture below)



The screenshot shows the 'Account' page with a navigation bar containing 'POSTS', 'FEEDBACK', 'PROFILE', 'USERS', 'NOTIFICATIONS', and 'ACCOUNT DETAILS'. The 'PROFILE' tab is active. Below the navigation bar is the 'Key Information' section, which includes a note: 'All information marked with an asterisk are required for validation and identifying your posts.' The form fields are: 'Organisation Name *' (Surrey County Council), 'Email Address *' (social.value@surreycc.gov.uk), 'Sector *' (Other), 'Type *' (Public), 'Organisation Size *' (501+), 'Organisation Registration Number (if applicable)', 'Organisation Address' (Street Number & Name *), 'Town *' (Kingston), and 'Postcode *' (KT1 2DN).

3.7. The **“General Information”** section of your profile is optional but you are strongly advised to complete this section as this information will appear on your profile page under the **“Organisations”** tab and at the bottom of your posts. Completing this section will enable others to learn more about your organisation and may influence whether or not other organisations choose to contact and/or work with you.

(See picture below)



The screenshot shows the 'General Information' section of the profile page. It includes a note: 'This information is optional. It will appear at the bottom of your posts and on your organisation's public profile, helping others to understand who you are.' The form fields are: 'Logo' (with a placeholder image and an 'ADD' button, note: 'A logo 250x250px works best.'), 'Header Image' (with a placeholder image and an 'ADD' button, note: 'A banner 1040x288px will work best.'), and 'Bio' (with a text area and a character count of 0 / 300).

3.8. The “**Contact Information**” section is also optional. This information will appear on your profile page under the “**Organisations**” tab and at the bottom of your posts.

(See picture below)

Contact Information
This information is optional. It will appear at the bottom of your posts and on your organisation's public profile, giving others quick access to more information.

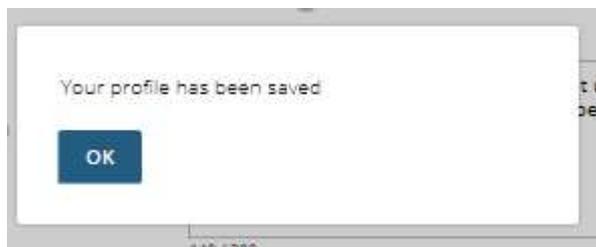
Website
345Charity.org

Phone Number
01234 567890

SAVE PROFILE

3.9. When you have completed your profile click “**Save Profile**” and you will receive confirmation that your profile has been saved.

(See picture below)



3.10. Once you have created your profile, it is important to that you enable and select the frequency of alerts under “**Notifications**”. You will not receive any notifications of any activity on the Marketplace until this have been enabled.

(see picture below)

Account

POSTS FEEDBACK PROFILE USERS NOTIFICATIONS ACCOUNT DETAILS

Alerts Enabled

How would you like to receive alerts?

Platform

Email

SMS

What would you like to know about?

Type	Type
<input type="checkbox"/> Requests	<input type="checkbox"/> Volunteering
<input type="checkbox"/> Offers	<input type="checkbox"/> Skills
	<input type="checkbox"/> Equipment
	<input type="checkbox"/> Skills & Knowledge
	<input type="checkbox"/> Educational
	<input type="checkbox"/> Buddy scheme
	<input type="checkbox"/> Other

When would you like to receive alerts?

Frequency

Individually As Posts Are Added

As A Daily Bundle

As A Weekly Bundle

SAVE ALERT SETTINGS

3.11. To view your organisation’s profile click “**The Marketplace**” and then click “**Find out who is using the Marketplace**”.

(See picture below)

Help the community Find help or support for your Community

[See where you could make a difference](#) [See what is already on offer](#)

[Create a new post](#)

[Find out who is using the Marketplace](#)

[The Marketplace in action](#)

REQUESTS OFFERS ORGANISATIONS ADD NEW POST ADMIN

search a keyword Category: ALL CATEG... Sort By: A-Z Grid Map

21st Century AV Ltd EQUIPMENT & SUPPLIES

Five server Audio Visual & Unified Communication Solutions that help businesses integrate and collaborate with next generation technologies. Integrating communications across networks is a fundamen...

[VIEW PROFILE](#) [CONTACT](#)

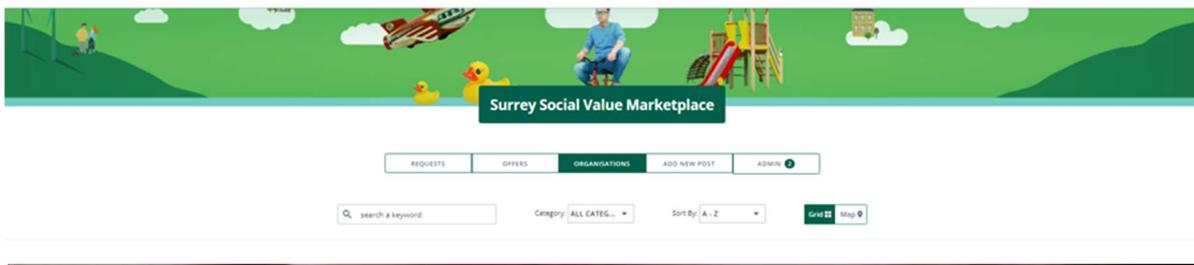
24-7 Healthcare EQUIPMENT & SUPPLIES

24-7 Healthcare provide moving and handling products designed to compliment single-handed care where possible. Our product portfolio includes ceiling track hoist systems, standing and mobile hoists. E...

[VIEW PROFILE](#) [CONTACT](#)

3.12. When you find your organisation, click “**View Profile**”. The information visible to others will be based on the fields you chose to complete in your organisations profile. You can change and/or update this at any time.

(See picture below)



← BACK

REPORT ORGANISATION

TEST

Conservation Projects

Location

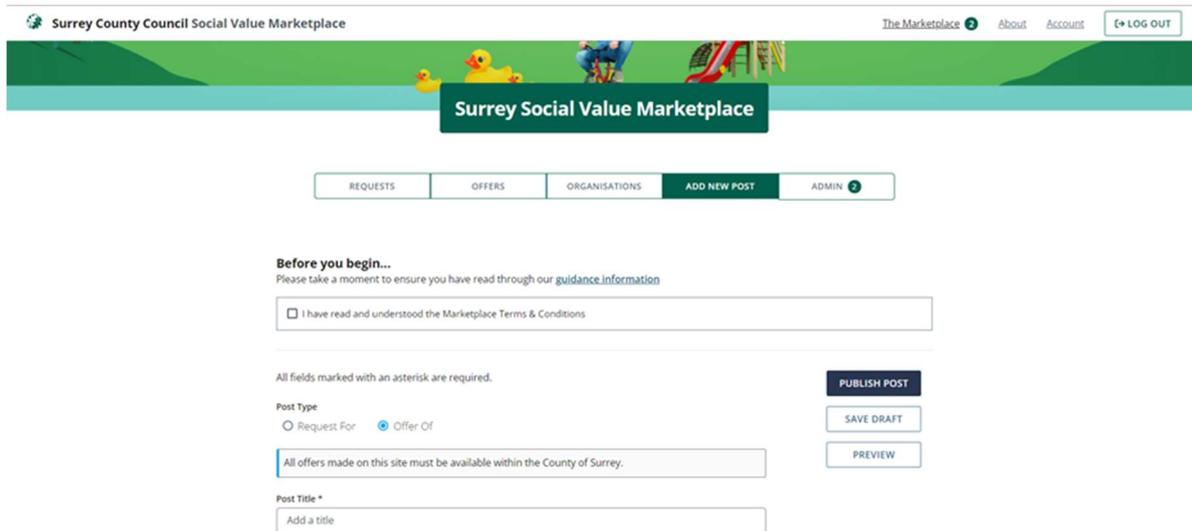
10 High Street
Town
ABC 123

Contact details

 lisa@seafordparish.org.uk

4. Posting an Offer of Help and/or Post a Request for Help

4.1. You must be logged into your account to create a post. Click “Add New Post”



The screenshot shows the 'Surrey Social Value Marketplace' interface. At the top, there is a navigation bar with 'Surrey County Council Social Value Marketplace' on the left, 'The Marketplace', 'About', 'Account', and 'LOG OUT' on the right. Below this is a banner with a green background and a dark green bar containing the text 'Surrey Social Value Marketplace'. Underneath the banner is a horizontal menu with buttons for 'REQUESTS', 'OFFERS', 'ORGANISATIONS', 'ADD NEW POST' (highlighted in dark green), and 'ADMIN'. The main content area is titled 'Before you begin...' and includes a link to 'guidance information'. There is a checkbox labeled 'I have read and understood the Marketplace Terms & Conditions'. Below this, a note states 'All fields marked with an asterisk are required.' The 'Post Type' section has two radio buttons: 'Request For' and 'Offer Of' (selected). A text box below contains the note 'All offers made on this site must be available within the County of Surrey.' The 'Post Title *' section has a text box with the placeholder 'Add a title'. On the right side of the form, there are three buttons: 'PUBLISH POST' (dark blue), 'SAVE DRAFT' (light blue), and 'PREVIEW' (light blue).

4.2. You must ensure you have read the “**Terms of Use**” and “**Privacy Policy**” before you add a new post as you will be required to confirm this before your post can be submitted for approval. You can choose to post an offer or request but you cannot offer help and request help in the same post.

4.3. In the “**Post Title**” section you should enter the type of support you are requesting and/or the type of help you are offering. The clearer you are the easier it will be for other organisations to understand what you are requesting and/or offering, for example volunteers, office space, equipment, skills and knowledge.

4.4. When entering the location of the offer/request please note the following:

- a) Requests for help will only be approved if the organisation requesting the help is based in the county of Surrey.
- b) Offers of help can be made by any organisation based anywhere, however the offer must be delivered within the county of Surrey.
- c) Ensure you enter the exact postcode of where the help is being requested and/or where the offer is available.

4.5. To help you better promote your offer and/or request you can upload images or add a web link / URL to a video. The use of media is optional, if you choose to use media please ensure you have read and understood our Privacy policy and have obtained explicit consent to use the media as you will be required to confirm this in order to publish your post.

(See picture below)

Media



Description *

B *I* U ☰ ☰

A large, empty rectangular text box with a thin border, intended for entering a description.

0 / 500

Tags

A horizontal text input field with a light gray border. Inside the field, the text 'Use a space to separate tags' is displayed in a light gray font.

Tag your offer or request to make it easier for organisations to find when they search the marketplace e.g #communityproject

4.6. In the “**Description**” text box you should provide a summary of the request / offer. This is your opportunity to outline why other organisations should either provide you with the help you are requesting or claim the help you are offering. The more information you provide the easier it will be for other organisations to make their decision.

4.7. To make your post easier to find you can add tags, for example #volunteers #training. This is optional - you can still publish a post if you choose not to use tags

(See picture below)

Expiry Date

A date selection field with a calendar icon on the left and the text '11 July 2022 (Default)' inside the field.

The default expiry date is 3 months. After that, your post will be archived and you will need to update the offer/request with a new date.

Type

- Volunteering
- Space
- Equipment
- Skills & Knowledge
- Educational
- Buddy scheme
- Other

4.8. Ensure you have enabled on “**Notifications**” in your “**Account**” (see **3.10** for instructions on how to do this).

4.9. The Marketplace can only be used to request and/or offer **non-financial** support.

4.10. To meet requests when they are needed and take advantage of help when it is available it is important to keep posts up to date. The default date for expiry on all posts is 3 months. After this period your post will be archived into your account. You can edit the date in your account profile at any time to keep the post visible and live.

4.11. To help make it easier for organisations to find requests and offers you must select the **“Type”** of resource you are looking for

(See picture below)

- Type
- Volunteering
 - Space
 - Equipment
 - Skills & Knowledge
 - Educational
 - Buddy scheme
 - Other

4.12. If you don't have all the information you need you can click **“Save Draft”** and the post will be saved in your account.

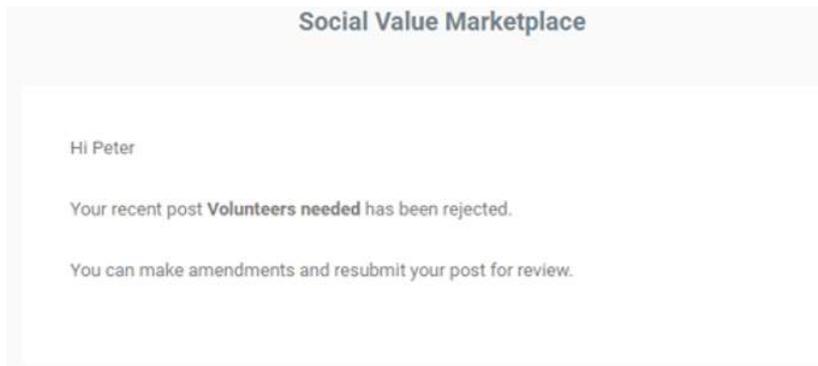
4.13. If you have completed the information, then click **“Preview”** to view what others will see on the Marketplace. When you are ready to make your post live click **“Publish Post”**

(See picture below)



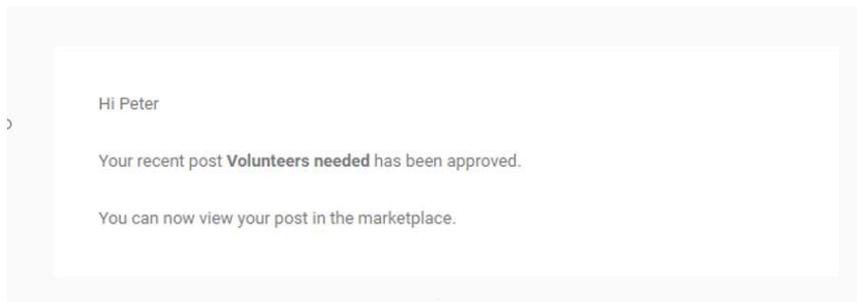
4.14. All posts are reviewed by the administrator before they are published on the Marketplace.

(See picture below)



4.15. If there is an issue with your post, you will receive an email from the administrator outlining the reason why your post was not published

(See picture below)



4.16. If there are no issues with your post you will receive an email to inform you that your post has been published and is live on the Marketplace.

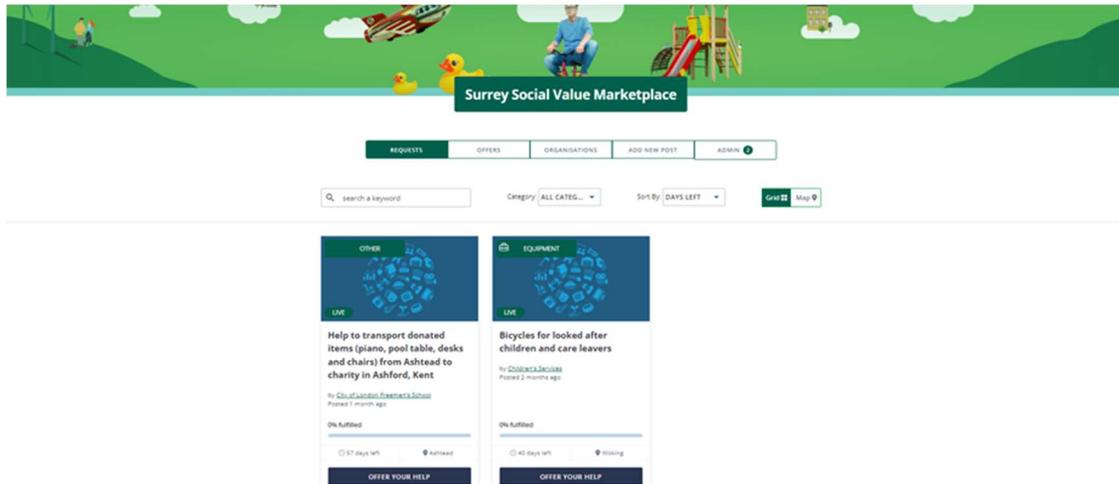
4.17. When your post has been published other organisations will be able to view your requests / offers and will contact you if they can help or want the resources you are offering.

4.18. Key points to remember:

- It is entirely up to organisations to decide who to work with
- By posting an offer or request there are no guarantees that an organisation will respond to your request or claim your offer
- The posts made by organisations can be changed at any time
- Unless you switched on alerts in “**Notifications**” (3.10) you will not receive any notifications about your offer or request.

5. Responding to a Request for Help and/or Claiming an Offer of Help

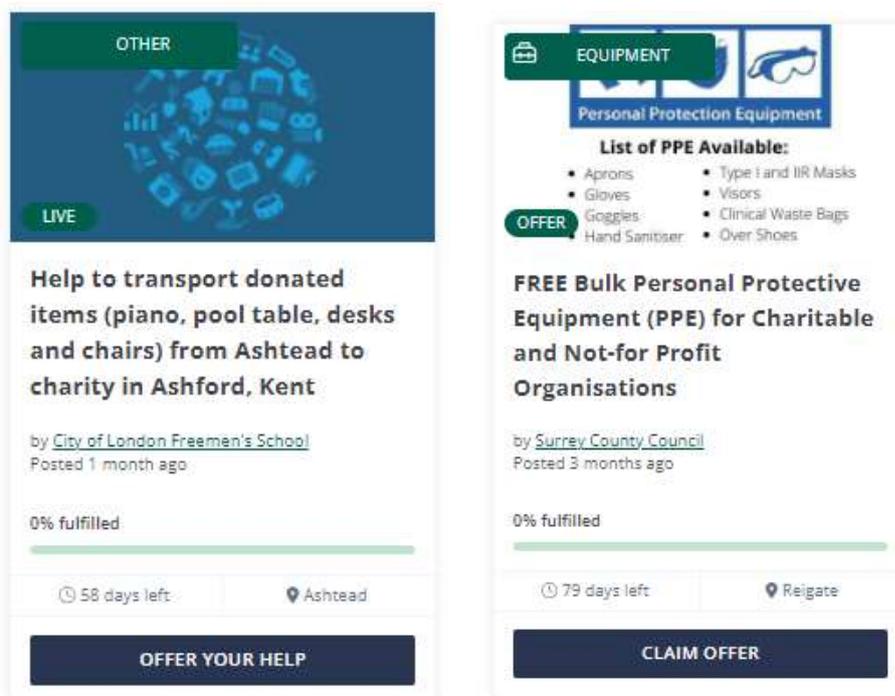
(See picture below)



5.1. To view the requests or offers click **“Marketplace”** on the main task bar at the top of the page. Click requests / offers to view what organisations need or how organisations can help.

- You can use filters, sorting tools and map functions to specify locations, types of requests/offers and expiry dates.
- The fulfilment level indicates how much of the request has already been met, or how much of the offer has already been claimed

(See pictures below)



Click “**Offer Help**” to respond to a request or “**Claim Offer**” if you want the help available.

(See picture below)

← BACK

REPORT POST

Volunteers needed

Volunteering

About Test post about volunteers that will be accepted

Who TEST

Where 10 High Street, Town, ABC 123

When 11 July 2022
91 days left

Offer help

Send as lisa.hadie@east Sussex.gov.uk

Thank you. Please use this box to contact us or to tell us how you would like to help us.

This message and your contact details will be shared with the organisation that has posted the request. This organisation will contact you directly to discuss further. Please note we cannot guarantee messages will be sent securely.

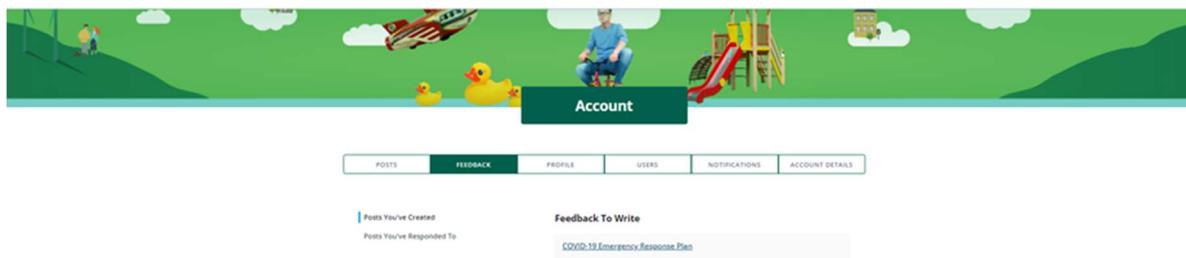
SUBMIT OFFER

- 5.2. You are advised to review the information about the post and the organisation before you submit an offer of help or claim an offer of help.
- 5.3. To offer help or claim an offer you should use the text box provided to send an introductory message to the organisation that posted the request or offer.
 - a) If responding to a request you should inform the organisation why you want to help and how you can help them.
 - b) If responding to an offer you should inform the organisation why you need the help they are offering and how much of their help you need.
- 5.4. When you have completed your message click “**Submit Offer**” in response to a request or “**Claim Offer**” in response to an offer of help.
- 5.5. An email with your message will be sent to the organisation that posted the offer or request you responded to and they will contact you if they are interested in working with you.

6. Giving and Receiving Feedback

- 6.1. It is a mandatory requirement for all organisations to provide feedback on the social value delivered or received through the Marketplace. Feedback will be used to ensure the continuous improvement of the Marketplace and could be used in case studies to underline the positive impact of the tool.
- 6.2. When you respond to a post and send a message to an organisation to either “**Offer Help**” or “**Claim Offer**” it is automatically logged in the “**Feedback to Write**” section of your account.

(See picture below)



- 6.3. In the “**Feedback**” section you can view feedback based on
- “**Posts You’ve Created**” – a list of organisations that responded to your posts will automatically be created in this section
 - “**Posts You’ve Responded to**” – a list of the organisations whose posts you responded to will automatically be created in this section
- 6.4. In both “**Posts You’ve Created**” and “**Posts You’ve Responded to**” feedback is sorted as follows
- “**Feedback to Write**” – In this section you need to confirm if you worked with an organisation or not.
 - “**Past Feedback You’ve Written**” – In this section you will find information on the feedback you have already provided and shared with the organisation/s you worked with and the administrator
 - “**Feedback you have received**” – In this section you find information on the feedback you have received from others.
- 6.5. If you select “**No**” this will be deleted from your profile and no further action is required by you.
- 6.6. If you select “**Yes**” you will be required to provide further information.

(See picture below)

How was your experience working with them?

Good Bad

Please give us some detail

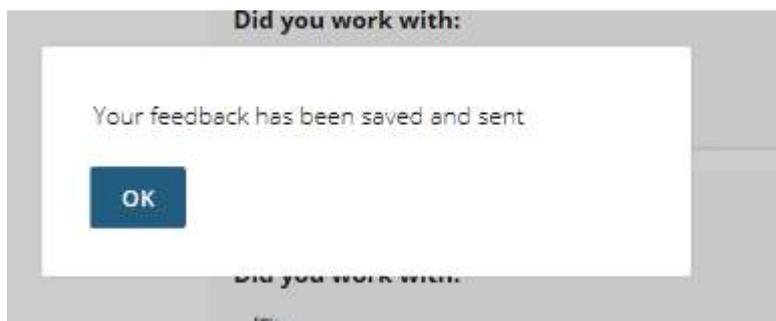
Let us know

Attach evidence

I consent to my feedback being used to promote social value

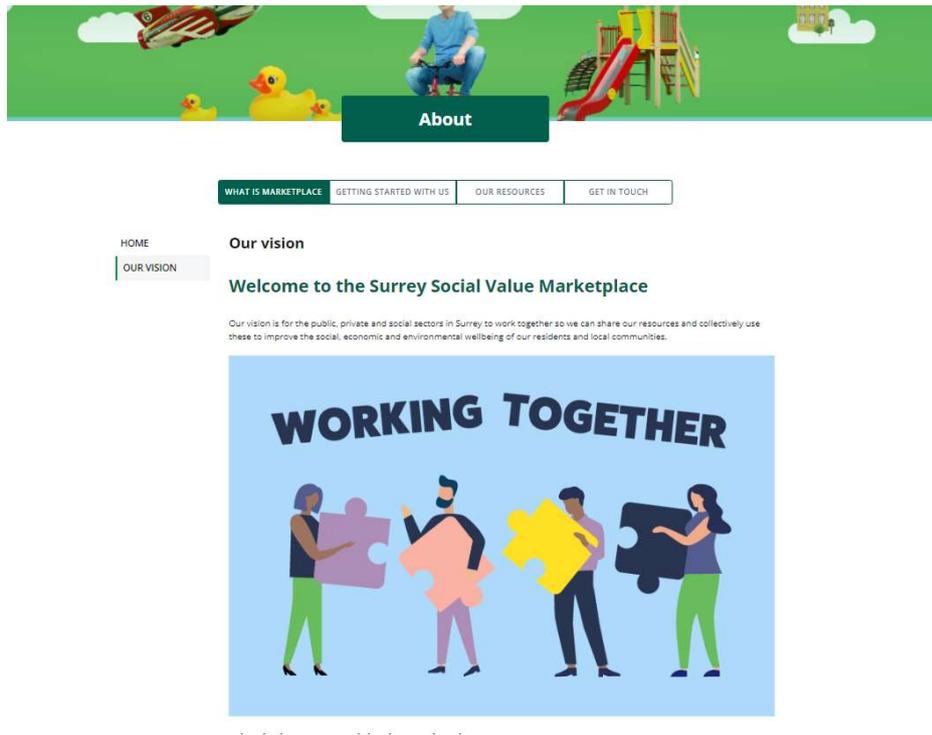
- Provide feedback on your experience with working with the organisation
- Provide details on what benefits you received or provided
- Attach an image or add a link to a video as evidence that you received or provided the benefits
- If you add an image or video link you must confirm you have explicit consent to use the media
- Tick the box to provide consent to your feedback being used to promote social value
- Click “**Submit Feedback**”

(See picture below)



6.7. When you submit your feedback, it will be sent to the company you worked with and the administrator of the Marketplace

7. The “About” Page



7.1. Click “Getting started with us”

- to create an account,
- add/review a post
- leave feedback.

7.2. Click “Resources” to

- find useful links to information
- read case studies

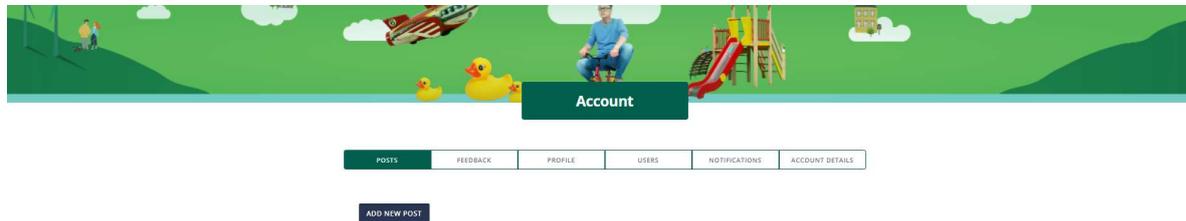
7.3. Click “Support” to

- learn how to get started,
- download guidance
- get answers to frequently asked questions
- read the terms and conditions of use
- read the privacy policy

7.4. Click “Get in Touch” to access the “Contact Us” form to send a message to the administrator

8. The “Account” Page

This section is only visible to you and the users attached to your account



8.1. In the “**Posts**” section you will see a list of all the posts made by your organisation including those that have expired.

- Posts marked “**R**” are the requests your organisation has made
- Posts marked “**O**” are the offers your organisation has made

8.2. In the “**Posts**” section you can

- “**Modify**” your posts if you need to change the details.
- “**Archive**” your posts if the timeframe for your request / offer has ended
- “**Preview**” your post to see the information that will be visible to other users

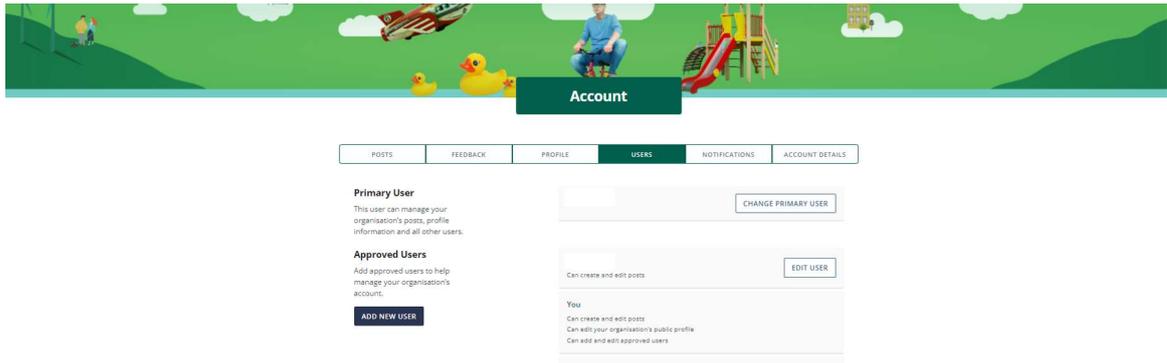
8.3. In the “**Feedback**” section you can view

- Feedback to you need to write
- Past Feedback You’ve Written
- Feedback you have received

8.4. In the “**Profile**” section you will see the information that is visible on your organisations profile

8.5. In the “**Users**” section you will see a list of users attached to your organisations profile.

(see picture below)



8.6. 'Primary Users' are the individuals that set up the account for the organisation. The primary user can

- a) Make changes to the organisations profile
- b) Add and respond to offers and/or requests and provide feedback
- c) Invite other users to join
- d) Controls rights of other users and enable other users to:
 - add/edit posts on behalf of organisation
 - edit organisations profile
 - add or edit other approved users
- e) Make a request to the administrator to delete the organisation's account

8.7. Click the "**Notifications**" tab to select

- Select how you would like to receive notifications - email and/or SMS (text message). If you select SMS then you must provide a mobile number.
- What you would like to receive notifications about
- The frequency that you want to receive notifications

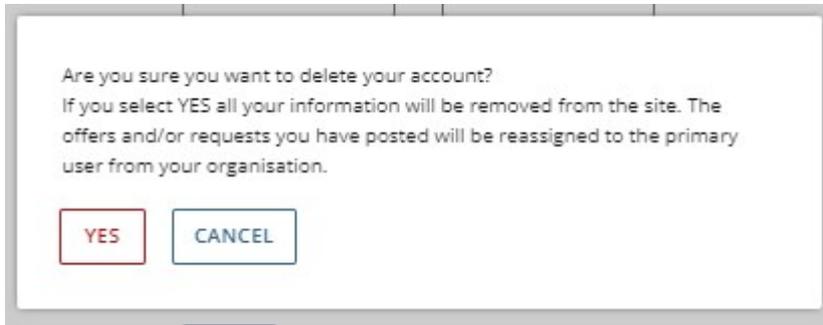
8.8. Click the "**Account Details**" tab to:

- View or change your contact details
- Change your password
- Delete your account

8.9. To delete your account:

- a) If you are a secondary user, you can delete your account by clicking "**Delete**" in your account profile
- b) If you are the primary user; you can either:

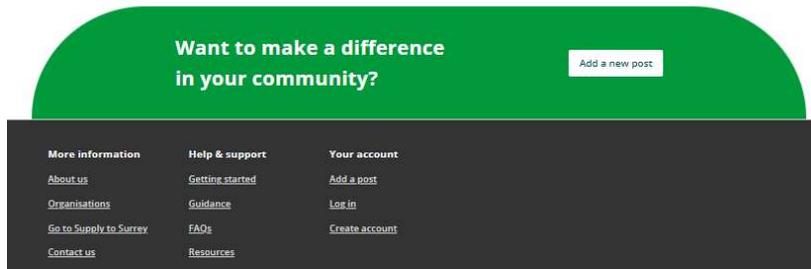
- Transfer the ownership of the organisation's account to a secondary user and delete your contact details
- Delete the organisation's account



8.10. To have a profile on the Marketplace an organisation must have a primary user who accepts overall responsibility for the offers posted or commitments to fulfil requests.

9. Link to Supply to Surrey

- 9.1. Supply to Surrey is a resource to facilitate the growth of local organisations through the development of local supply chains



- 9.2. Local organisations can find details of local contract opportunities from a range of other organisations including Local Authorities and other public sector bodies such as Councils, Universities and Health Services on the “**Opportunities**” tab.
- 9.3. You also have the opportunity to register on the site to promote your business and sign up for email alerts.
- 9.4. The site provides information about funding and resources for workforce skills development, local grants and events.

10. Contact the Marketplace Administrator

10.1. You can contact the administrator by email at social.value@surreycc.gov.uk

10.2. You can use the “**Contact Us**” form on the “**Help**” tab which can be found on the “**About**” page

10.3. If you need to report a post or an organisation you can

- Use the “Report Organisation” link which can be found on each organisation’s profile
- Use the “Report Post” link which can be found on every offer or request