

Social Value Procurement Policy

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1. Introduction

Each year the Royal Borough of Windsor and Maidenhead (RBWM) spends millions of pounds on services, products and works for the benefit of its residents. This expenditure is governed by strict and robust constitutional rules and external legislation. The procurement function is charged with the task, above certain legislative thresholds, of coordinating the purchase of many of these requirements and in doing so, the team utilises all commercial tools at its disposal to create healthy, competitive environments encouraging bidders to put forward their best solutions for the best price. RBWM is unflinching in its commitment to excellence for its residents and does not exclusively examine price – the *quality* or technical aspects of bidders' offers is also assessed. While, for instance, the price of an operator's bus service is critical, so, too, is understanding their approach to customer service, accountability, transparency and governance, communications, punctuality and minimising disruption.

Procurement teams ask suppliers to demonstrate their competency in a variety of areas through questions (which are subsequently evaluated by the teams responsible for delivering the relevant services). In recent years, however, public bodies tend to look beyond the immediate goods, services and works being procured (which remain foundational and critical) and draw out broader benefits. The Public Services (Social Value) Act 2012 (the 'Act') places obligations on relevant authorities to consider social value during public procurement activities when procuring services above the thresholds set out in Schedule 1 of the Procurement Act 2023. The Act requires authorities consider how procurement might improve the **economic, social and environmental** wellbeing of the relevant area (for RBWM this means within the boundaries of the Royal Borough of Windsor and Maidenhead unless jointly procured with another authority). These benefits are more broadly known as 'social value'. Similar expectations are established in the National Procurement Policy Statement (NPPS) – referenced in Section 13 of the Procurement Act 2023– which all public sector contracting authorities must have regards to. This sets out national priorities including delivering '*social and economic value that supports the Government's missions*'.

Social value is a term **strictly understood within a public procurement context**. It is acknowledged that this term has taken on a broader meaning since its introduction in a procurement context; however, *this* policy should be viewed through a procurement lens exclusively and readers are referred to the linked policy documents set out below for non-procurement social value policies.

Practically, using the example of a construction programme, the procurement process will review how the supplier will also deliver wider benefits to the local community, which will then be overseen in the delivery of any future contract management. The table below provides some examples of what this might include (NB: see Table 3: RBWM Focus Points for RBWM's actual priorities):

Table 1: Theme Examples

Theme	Example
Social	<ul style="list-style-type: none"> • Delivering learning to schools to educate pupils on health and safety.
Economic	<ul style="list-style-type: none"> • Commitments to hiring local residents and using local businesses for their supply chain. • Offering apprenticeships to young people.
Environmental	<ul style="list-style-type: none"> • Commitments to reducing carbon footprint. • Utilising electric vehicles or biofuels.

This means that although the authority is contracting for construction, the supplier, in delivering this, will also deliver wider benefits to the local community. Social value, therefore, is something to be embraced and prioritised as it has the potential to really add value.

Social value activity links various strategic aims and priorities for RBWM, including:

Strategy	Goal/Aim/Theme (where applicable)
Council Plan (2024 – 2028)	Aim 2 - A cleaner, greener, safer and more prosperous borough.
Council Plan (2024 – 2028)	Aim 5 - A high-performing council that delivers for the borough.
Financial Improvement & Sustainability Plan (2024)	Theme 2 – Service Transformation, Efficiencies and Contract Savings
Financial Improvement & Sustainability Plan (2024)	Theme 3 – Optimising Income
RBWM Advertising and Sponsorship Policy	Entire policy
RBWM Corporate Social Responsibility Policy	Entire policy

2. Evaluation of Social Value

In a procurement context, as mentioned above, where RBWM conducts an above-threshold (i.e. above the thresholds set out in Schedule 1 of the Procurement Act 2023) competition, we will typically evaluate quality *and* price (each with overall weightings) against its scoring methodologies. The procurement function determines the weightings of these criteria on a

case-by-case basis to ensure that the procurement strategy is tailored to the requirements. When assessing ‘quality’, the authority will ask a series of questions to understand bidders’ solutions and these questions have individual weightings. ‘Quality’ includes ‘social value’. A simplified illustration of this is below.

Table 2: Simplified Evaluation Example for a Construction Contract

Price	Weighting
Quality	Percentage
Q1: Please provide a clear and comprehensive financial breakdown, resulting in your final and best price.	50%
Q2: Please detail your approach to project management, detailing as a minimum...	15%
Q3: Please detail your plans, supported by drawings and...	20%
Q4: Please outline and explain your staffing model and provide assurances as to the expertise of your staff....	5%
Q5: Social Value: As part of your solution, please detail your approach to social value. As a minimum you should set out: <ul style="list-style-type: none"> - What efforts will be made in relation to the environment, carbon reduction and sustainability. - Your approach to recruitment, including how you intend to encourage underrepresented groups to apply (e.g. veterans). - Your approach to stimulating the local economy and utilising a local supply chain. 	10%

The supplier must then provide a comprehensive response for each question which will undergo robust evaluation and attract a score. The bidder with the highest overall score is recommended as the supplier to whom the contract is awarded. The signed contract will include the supplier’s responses to these questions so that they can be held to account in their delivery, including their social value commitments. Suppliers will then be required to report back to the authority with their activities, often utilising toolkits to quantify and measure their social value success.

3. Our Focus and Approach

RBWM welcomes all socially valuable offers and will make any priorities (where applicable) express in the tender documentation. This policy does not purport to restrict or confine the ambit of suppliers’ solutions; however, as a local authority, RBWM has a number of high-level focus points. We also appreciate that these focus points are not entirely discrete – some points touch on one or more themes.

Table 3: RBWM Focus Points

Theme	Focus Points
<p style="text-align: center;">Social</p>	<ul style="list-style-type: none"> • Building partnerships and collaborating with local SMEs and VCSE organisations. • Helping local SMEs and VCSEs build capacity. • Local volunteering. • Promoting good mental health and wellbeing. • Work experience opportunities (e.g. for schools). • Educational outreach (e.g. to schools, colleges, sixth forms). • Innovations to address the reduction and prevention of crime. • Promotion of physical activity and healthy lifestyles. • Championing accessibility and equality, including, where possible, initiatives pertaining to RBWM’s: armed forces covenant; care leaver ambitions; Fostering Friendly; Disability Confident and the Menopause Workplace Pledge. • Encouraging or engaging in corporate parenting/fostering.
<p style="text-align: center;">Economic</p>	<ul style="list-style-type: none"> • Minimising economic inequality. • Local recruitment. • Employment and training for young people (including the obtaining of qualifications and apprenticeships). • Recruitment of underrepresented groups. • Utilising local supply chains and spending/sourcing locally. • Commitments to the Real Living Wage. • Career promotion, guidance and advice. • Promoting local economic growth.
<p style="text-align: center;">Environmental</p>	<ul style="list-style-type: none"> • Carbon reduction measures and efforts to assist RBWM, and its partners, to achieve ‘net zero’ by 2050. • Use of electric vehicles and biofuels. • Commitments to preserve and encourage biodiversity. • Utilising sustainable materials. • Ethical supply chains that are environmentally sensitive. • Activities that would support any corporate environmental or sustainability plans or strategies.

	<ul style="list-style-type: none">• Promoting sustainable lifestyles (e.g. utilising public transport and cycling).• Commitments to planting trees, wildflowers etc. and any projects that would be conducive to RBWM meeting its targets or ambitions in its Environment and Climate Change Strategy/Biodiversity Action Plan.
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RBWM will review these focus areas annually. Any changes will be informed by (amongst other things): corporate strategies and policies; professional advice and guidance; market feedback; legislative and policy changes; and elected councillors. The above table should act as a guide to the type of areas RBWM will include within the social value question of tender documents, and where relevant other points may be added to specific tender questions.

As explained above, when launching above-threshold competitions, suppliers are charged with the task of responding to a series of questions (each with their own weighting). RBWM makes the following commitments in this regard:

- To include a social value question for all above-threshold procurements (unless an exemption is granted by the Procurement Manager).
- To consider the inclusion of a social value question for any below-threshold request for proposals where there is a qualitative element to the evaluation (i.e. the submissions are not exclusively assessed on the basis of price).
- To consider meaningfully the weighting (i.e. percentage of marks available) of the social value question against the following criteria:
 - **The nature and constitution of the market:** SMEs and VCSEs may not have the capacity to deliver as much social value as larger organisations. Heavily weighted social value criteria may unduly favour larger organisations and present barriers to SMEs and VCSEs.
 - **The nature of the requirement:** some requirements lend themselves to the inclusion of social value more than others. For example, routine purchases of stationary may present fewer opportunities to generate social value, and a highly weighted social value question may frustrate obtaining best value for residents.
 - **The financial envelope of the requirement:** suppliers are in a stronger position to deliver benefits to the community where they have a larger financial envelope – they invest and obtain returns. There is a proportionality between the budget and their social value offers.

- To utilising a social value-specific scoring methodology – suppliers’ responses will be assessed utilising a clear and *distinct* scoring methodology to minimise ambiguity and risk in the tendering process.
- To giving the market a voice in preliminary market engagement activities regarding the ambit of social value to ensure we minimise barriers and work collaboratively.

4. Implementing and Monitoring Social Value

The roles and responsibilities regarding the implementation and monitoring of social value are as below:

Table 4: Social Value Roles and Responsibilities

Role	Responsibilities
<p>Procurement Team</p>	<ul style="list-style-type: none"> • To facilitate required market engagement activity on social value. • To work with officers in the service area to design social value questions. • To ensure social value questions are evaluated and moderated fairly. • To provide advice and guidance on social value. • To provide social value training to officers.
<p>Commissioning Service (including the Contract Manager)</p>	<ul style="list-style-type: none"> • To work with procurement to develop social value questions and for market engagement activity. • To evaluate fairly supplier social value submissions and partake in moderation. • To ensure the relevant contract manager is monitoring social value. • To hold the supplier to account in its social value delivery (or non-delivery). • To report on social value progress and delivery.

Contract managers are the primary officers responsible for monitoring social value delivery at RBWM. It is incumbent on many suppliers to provide this information to RBWM as part of their reporting requirements. Social value commitments are as enforceable as any other contractual requirements – this means that contract managers can utilise all the performance management tools at their disposal to enforce the delivery of the supplier’s obligations. Examples include performance improvement plans or more extreme levers such as termination.

Assessment of social value varies depending on the size of the contract and the nature of the social value commitment. Measuring biodiversity improvements, for example, is different in nature to assessing volunteering activities. Some of modes of assessment include:

- Quantifying the number of hours of social value activity.
- Transposing the hours of social value activity into a pecuniary measurement (£).

RBWM's ambition for 2026 is to create and embed a more consistent approach for new above-threshold contracts so that social value progress and delivery can be assessed and monitored with greater ease – such data then drives strategic decision-making and action. The procurement team have already started testing a standard template and commit to continuous improvement. We also want to develop stronger communication channels between contract managers and the leadership team to enable the sharing of successes in social value delivery.

The Contract Management and Excellence Forum (which is a platform to inform, resolve and be strategic at a pan-council level) is RBWM's main platform for sharing best commercial practice and this includes guidance and driving innovation through social value.

5. Governance and Oversight

Overall responsibility for maintaining the social value procurement policy sits with the Procurement Manager within the Resources Directorate. All contract managers have responsibility for implementing and complying with the policy when tendering and managing contracts in their service areas. The relevant councillor with oversight of this policy is the Cabinet Member for Corporate Services. This policy will be reviewed annually.

Any immediate queries about this policy can be directed towards: procurement@rbwm.gov.uk.