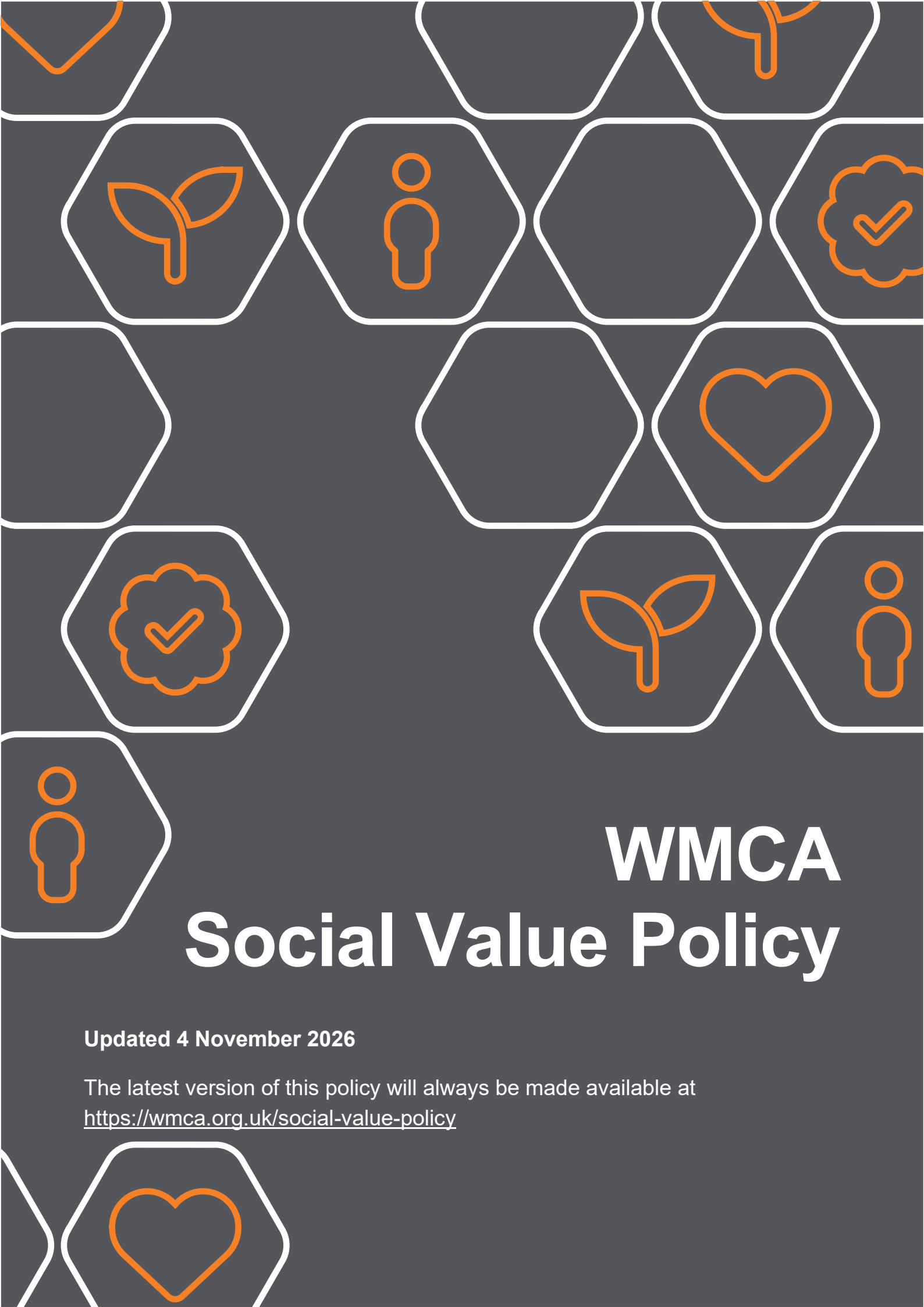


WMCA Social Value Policy

Updated 4 November 2026

The latest version of this policy will always be made available at https://wmca.org.uk/social-value-policy

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1 Introduction

Social impact is the life-changing effects that our actions have on our people, business, places and story. It is about creating permanent, positive, and significant social, environmental, or economic change through deliberate activities which change people's lives. In the WMCA, our Social Impact Statement brings together our approaches to corporate social responsibility, social value, and philanthropy, all underpinned by our shared commitments to maximise the social, economic and environmental impact from our work. It supports delivery of our Corporate Plan[1] and our regional strategic priorities, as set out through the West Midlands Growth Plan[2], Inclusive Growth[3] framework and statutory equality duties.

Our Statement covers:

Social impact		
The life-changing effects that our actions have on people, place, and planet.		
Corporate social responsibility	**Social value**	**Place-based philanthropy**
How we lead as a business	Wider benefits from public spending	Leveraging private resources for public good

This revised Social Value Policy sets out the requirements we place on companies that supply goods and services to the WMCA to leverage their spending to achieve socially valuable aims.

[1] WMCA Corporate Plan https://www.wmca.org.uk/corporate-plan
[2] West Midlands Growth Plan https://growth.wmca.org.uk/
[3] West Midlands Inclusive Growth Framework https://wmca.org.uk/inclusivegrowth

2 Scope

This policy applies to all goods, services, and works[4] procured by the West Midlands Combined Authority (WMCA), including Midlands Connect. Whilst this policy does not apply to procurements carried out on behalf of separate legal entities (e.g. Midlands Metro Limited, West Midlands Rail Executive and West Midlands 5G), all bodies in the WMCA Group are encouraged to consider and adopt the approach set out in this policy. Contract value thresholds and requirements will vary to reflect the principle of proportionality.

This policy applies to new contracts and frameworks being tendered from 1st September 2026. When using awarded frameworks after 1st September 2026, the policy should be followed to the extent permitted.

All WMCA employees and contractors are required to comply with this policy.

[4] Individual Contractors are not in scope for this policy. However, suppliers who are contracted to supply contractors (agencies), are likely within scope

3 Regulatory context

WMCA is required, through a combination of statutory obligations and policy expectations set out in the Procurement Act 2023, the Public Services (Social Value) Act 2012, and the National Procurement Policy Statement, to consider and implement the following actions in its approach to procurement.

1. Consider how procurement might improve the economic, social, and environmental wellbeing of the West Midlands.
2. Engage with stakeholders, including communities and service users, at the initial stages of intervention design – well before procurement planning.
3. Embed social value considerations in the strategic business case for procurement projects.
4. Ensure that social value outcomes are proportionate, relevant to the subject matter of the contract, and measurable.
5. Document how social value has been considered and include references in procurement documentation.
6. Incorporate social value into the performance measures for all contracts including frameworks and dynamic markets.
7. Ensure that social value commitments are monitored and reported throughout the contract lifecycle.

The regulations and related guidance documents contain several **key principles** that should be followed when applying this policy, i.e.:

- **Fair treatment:** treating all suppliers equally unless there is a justified reason to do otherwise. Where different treatment is justified, contracting authorities must take reasonable steps to ensure it does not give any supplier an unfair advantage or disadvantage.
- **Proportionality:** Social Value award criteria are likely to be proportionate if they are framed specifically having regard to the nature, complexity, and cost of the contract, and designed to meet the requirement and not go beyond this. The overall weighting allocated to social value award criteria should be proportionate considering the nature, complexity, and value of the contract.
- **Relevance:** Social Value requirements should be relevant to the nature of the contract. For example, if there is a high proportion of labour costs in the contract, it may be relevant to include a question and criteria about staff working on the contract.
- **Removal of barriers to SMEs and VCFSEs:** Authorities should also ensure that barriers to entry for start-ups, Small and Medium sized Enterprises (SMEs) and Voluntary, Community, Faith and Social Enterprises (VCFSEs) are minimised.

The regulatory context for procurement is not just an exercise in compliance, but a key strategic lever for enabling inclusive economic growth and maximising social and environmental impact. It is, therefore, our intention is to go beyond the minimum regulatory requirements and to adopt best practices throughout our approach to maximise public value for money.

4 Definition

Social value, in the context of this policy, refers to the wider benefits that public sector procurement can deliver beyond the core goods or services being purchased. It encompasses economic, social, and environmental outcomes that improve the wellbeing of people and places. This includes creating local employment, supporting small businesses, promoting sustainability, and enhancing community resilience.

This policy covers three aspects of social value:

1. **Contractual social value**: The social, economic, and environmental benefits delivered through the goods, services or works being procured as part of core contract delivery, for example transport infrastructure that improves regional connectivity and access to employment.
2. **Organisational social value**: The benefits created through how the organisation operates and spends its money, including who we employ, who we buy from, and how we support local and inclusive supply chains—for example, by increasing spend with Voluntary, Community, Faith and Social Enterprises (VCFSEs) and Small and Medium Enterprises (SMEs).
3. **Added social value**: Additional benefits delivered beyond core contractual requirements or business-as-usual activity, voluntarily committed to improve outcomes for people, places, and the environment—for example apprenticeships and local jobs, carbon reduction, employee volunteering, or support for local charities.

These aspects of Social Value form a core part of how WMCA delivers our regional strategic priorities for people, businesses, places and story across the WMCA area.

For the purposes of this policy, “local” is defined as within the constituent local authorities of the WMCA. Depending on the specific procurement there may be scope to further refine or deviate from this depending on the specific goods or services being purchased.

5 Vision

Our Social Impact Statement sets out our vision to **embed mission-driven, meaningful, and measurable social and environmental impact** at the heart of all our strategies, programmes, and procurement processes. This ensures that every investment and intervention contributes to our purpose: **making the West Midlands the best place to live, work, and visit**.

- **Mission-driven**: Focusing all types of investment – public, private, capital, revenue, time, attention – on our strategic priorities.
- **Meaningful**: Social and environmental considerations must be embedded from the earliest stages of WMCA activity —not retrofitted or left to chance.
- **Measurable**: Intrinsic and added impact must be tracked through clear and proportionate quantitative and qualitative assessments and evaluations.

6 Principles

1. **Social Value will be a core element of supplier selection and contract award.**

   This means that we will consider social value from the outset of a project. The weighting that we give to social value will be sufficient to motivate suppliers to develop innovative ideas, and we will scrutinise suppliers' social value proposals with as much attention as we would give to technical or commercial aspects of their bid.

2. **We will ensure that social value commitments are delivered.**

   This means that we will hold suppliers to account for delivery of their social value commitments. Suppliers' social value commitments will be a part of their contract. We will actively manage delivery as part of our contract management process. Our reporting will focus on what has been delivered, rather than what has been promised, and the impact of delivery aligned to community priorities.

3. **We will prioritise our time and resources on the highest value contracts that typically offer the greatest scope for creation of social value.**

   This means that we will differentiate our approach based on Total Contract Value (TCV). We will focus our resources on the highest value projects and contracts that have most scope for suppliers to deliver substantial value, without overlooking the value contributions that can be made irrespective of contract value.

4. **We will base our social value efforts on supporting our regional strategic priorities.**

   This means that we will align our tender requirements and bid evaluations explicitly to our regional strategic priorities, ensuring that social value contributes to a framework which is already understood and supported across WMCA.

5. **Our requirements will be proportional and appropriate to the size and nature of each contract.**

   This means that we will not impose unrealistic requirements on suppliers. We will ensure that our social value requirements are relevant to the contracts being tendered, so that suppliers can put forward meaningful proposals that can be delivered in practice. We will maintain a level playing field for Small and Medium Enterprises (SMEs) and Voluntary, Community, Faith, and Social Enterprises (VCFSEs) by taking account of the size of potential suppliers when evaluating their social value proposals.

6. **We will consider opportunities to collaborate with our constituent authorities.**

   This means that we will actively pursue opportunities to collaborate with our constituent local authorities as appropriate for their input to help to shape and prioritise social value requirements. We will collaborate with them to communicate with our shared suppliers, for example through supplier days. We will draw upon their local channels for community engagements and their networks of SMEs and VCFSEs. We will collaborate with them to harmonise our approaches to social value and to share good practices.

7. **We will comply with public sector procurement requirements.**

   This means that we will ensure that our approach complies with both the letter and the spirit of legislative requirements as they apply to WMCA. We will also adopt good practices that we are not obliged to follow, to the extent that they improve our approach and harmonise our approach with other public sector organisations.

8. **Social value reporting will be consistent and meaningful.**

   This means that we will limit the number of reported measures to a manageable number of useful measures that can be easily understood and that can be reported consistently.-We will bring qualitative reporting to the forefront, such as showcasing examples of what has been delivered. We will give a higher priority to reporting of specific initiatives that have delivered “real” benefits. We will integrate reporting of social value into our reporting of our impact via a Doubling Our Impact report.

9. **We will focus social value to address priority needs and opportunities**

   This means that we will adapt social value requirements to focus on where it will have the biggest impact in achieving the WMCA's regional strategic priorities, building such requirements into the core contract and guiding suppliers towards highest value additionality requirements. For example, by selecting specific TOMs (Themes, Outputs and Measures); by specifying how it aligns to the regional strategic priorities; and by supporting our priority groups, such as people who are care-experienced; young people 16-24 who are not in education, employment, or training; disabled people in line with our commitment to be an exemplary region for disabled people; children and families in poverty; and households living in temporary accommodation.

7 Intrinsic social value

Contractual social value

Many of the contracts tendered by WMCA will already have social value at the heart.

However, it is essential that opportunities to maximise social value are considered at the pre-procurement stage. i.e. before specifications are written or procurements are planned.

Example opportunities to generate contractual social value are provided in Appendix 2.

Organisational social value

The Procurement Act 2023 and the National Procurement Policy Statement (NPPS) place clear obligations on contracting authorities to support social enterprises and SMEs, and this is consistent with the broader aims of the WMCA.

Creating opportunities for VCFSEs and SMEs should be considered during the earliest stages of project and procurement planning.

Example opportunities to generate organisational social value are provided in Appendix 2.

9 Added social value

Added (or additional) Social Value describes benefits that are delivered over and above core contractual requirements. Activities that are essential to the contract, that suppliers are obliged to do, and for which they are being paid, cannot be considered or evaluated as Additional Social Value.

9.1 Weighting of added social value

The WMCA default standard is to apply a minimum **20%** weighting to Additional Social Value within a tender. e.g. Quality 40%, Cost 40%, Social Value 20%.

Variation from the 20%, whether higher or lower, should have a clear rationale and should be documented. The Head of Procurement should approve such variations for any contracts above £75,000

Example situations where a lower or higher weighting might be justified are provided in Appendix 3.

Where a tender is evaluated on a price only basis, suppliers should are expected to demonstrate alignment to the regional strategic priorities in the delivery of the contract.

Where a tender is a direct award, the Supplier will still be asked to submit Social Value proposals in line with the threshold bands for contract value set out in section 9.3 and will be monitored against performance of commitments.

For multi-lot tenders, Suppliers will be asked to submit a Social Value proposal for each lot. These will be evaluated separately for each lot in accordance with the threshold bands for contract value set out in section 9.3.

9.2 Evaluation of additional social value

Overview

Suppliers will be asked to provide added social value commitments against the length of the initial contract, not including any extensions. If the contract is extended, the Supplier will be expected to deliver social value outcomes throughout the extension period. WMCA will work with the Supplier to agree a new or refreshed set of social value commitments that are proportionate to the extension. The completion of social value commitments during the original contract term will not remove the requirement to deliver social value during any

extension period, nor does this imply that the level of commitment will automatically increase beyond that which is proportionate to the extension.

For bands 2-3, the 20% standard weighting is split into two parts: **Part One (10%)**

Part One evaluations will use “proxy values.” Proxy values convert quantifiable aspects of bids, such as the number of jobs created or the amount spent with local suppliers, into financial values that can be aggregated and compared across bids. A subset of the National Framework TOMs will be used, mapped to the regional strategic priorities (including the four parts of the West Midlands Growth Plan and the eight Inclusive Growth fundamentals).

Your social value method statement, setting out how you propose to deliver each TOM, will also be assessed as part of Part One. Where proposed delivery approaches do not provide sufficient confidence that commitments are achievable, proxy values may be moderated or discounted as part of the Part One evaluation.

Part Two (10%)

Part Two evaluation has been developed to enable a broader view of social value proposals to be considered.

A scoring scale will be used, which will enable WMCA to make a qualitative evaluation of proposals that can consider aspects such as local relevance, creativity, delivery capability, and alignment with our aims.

The above split will apply to all band 2-3 procurements.

For Band 4 procurements, guidance should be sought from the WMCA Social Impact Team on the appropriate allocation of the standard 20% weighting. This weighting split may be adjusted based on the specific requirements of the procurement, in line with advice provided by the WMCA Social Impact Team.

9.3 Threshold bands

Threshold bands are determined by estimated Total Contract Value (TCV), inclusive of VAT.

There are four threshold bands. Bands 1 and 4 apply to goods, services and works. Bands 2 and 3 apply only to goods and services (not works).

- Band 1: £0 - £74,999
- Band 2: £75,000 - £207,720[6]
- Band 3: £207,721[7]- £999,999
- Band 4: £1,000,000 and above

Band 1: £0 - £75,000 (goods, services and works)

Requirements

- Encourage suppliers to consider social value when developing proposals supporting our regional strategic priorities and Fundamentals
- Suppliers with significant ongoing total spend with WMCA will be engaged by Procurement.
- At the end of the contract delivery period, Suppliers will be asked to provide a statement to the Social Value Lead setting out:
    - Number of staff living the West Midlands who were employed on the contract and how many weeks they were employed on the contract
    - An aggregate sum spent with local SMEs in the West Midlands in the delivery of the contract

Band 2: £75,001 - £207, 720 (goods and services)

Requirements

- Bidders are required to provide a response to a minimum of two measures set out in Appendix 1 for Part One using standard TOMs methodology.
- Part One proposals will be evaluated and scored using proxy values.

[6] Or current GPA Threshold for Goods and Services
[7] Or current GPA Threshold for Good and Services

- Bidders are required to provide a response to Part Two, consisting of each proposed initiative, relating this to our regional strategic priorities and fundamentals, including a clear description of the proposal, how it will be measured and by when it will be delivered.
- The **Social Impact Team** will evaluate and score Part Two proposals.
- Social value commitments, delivery plan, and reporting timelines should be incorporated into the contract with the supplier.
- The **contract manager** should check that the social value commitments made by the winning bidder are delivered and reported against and should keep an auditable record of delivery.
- The **contract manager** should be satisfied that figures submitted for reporting purposes follow WMCA's standard reporting processes accurately reflect what has been delivered.

Band 3: £207, 721 - £999,999 (goods and services)

Requirements

- Bidders will be required to provide a response to a minimum of three measures set out in Appendix 1 for Part One using standard TOMs methodology.
- Part One proposals will be evaluated and scored using proxy values.
- Bidders will be required to provide a response to Part Two, consisting of a delivery plan for each proposal demonstrating how they relate to at least two of the eight Inclusive Growth Fundamentals (and in turn, to the regional strategic priorities), including a clear description of the proposals, a delivery plan, social value metrics, how they will be measured and by when it will be delivered.
- The **Social Impact team** should evaluate and score Part Two proposals
- Social value commitments should be incorporated into the contract with the supplier, including escalation processes and remedies for non-delivery.
- The **contract manager** should ensure that the social value commitments made by the winning bidder are delivered and should keep an auditable record of delivery.
- The **contract manager** should be satisfied that figures submitted for reporting purposes accurately reflect what has been delivered.
- The **contract manager** should engage WMCA Social Value Lead to discuss any concerns regarding delivery.

Band 4: £1,000,000 and above (goods, services and works)

The **Strategic Lead for Social Value and the Strategic Lead for Inclusive Growth** must be consulted in the preparation of tenders to advise how social impact and social

value can be maximised in line with the Social Impact Statement, to enable bid proposals to be tailored precisely to WMCA priorities.

Requirements

- Bidders will be required to provide a response to a minimum number of TOMs agreed by the Social Impact Team in Appendix 1 for Part One using standard TOMS methodology and commit to working with WMCA on any emerging pilots and innovations regarding social value which benefit the priority groups set out in this policy.
- Part One proposals will be evaluated and scored using proxy values.
- Bidders will be required to provide a response to Part Two, addressing the priorities outlined in at least two of the eight Inclusive Growth Fundamentals (and in turn, to the regional strategic priorities), including a clear description of the proposal, a detailed timeline, how it will be measured and by when it will be delivered.
- The Inclusive Growth and Social Impact team should evaluate and score Part Two proposals.
- Social value commitments should be incorporated into the contract with the supplier, including social value metrics, timelines, escalation processes, and remedies for non-delivery.
- Delivery of social value commitments should be incorporated into project governance reviews with the supplier.
- The **contract manager** should ensure that the social value commitments made by winning bidder are delivered and should keep an auditable record of delivery.
- The **contract manager** should be satisfied that figures submitted for reporting purposes accurately reflect what has been delivered.
- The **contract manager** should engage WMCA Social Value Lead to discuss any concerns regarding delivery.

10 Reporting

Supplier Reporting

Suppliers will be required to submit a report on progress towards the social value commitments, including evidence of delivery by local authority area and any emerging case studies. The specific requirements must be set out in the contract. This will be proportionate to need; for instance, a *Band 1* procurement may involve a light-touch statement alongside regular reporting requirements; while procurement in higher bands may require a regular report (e.g. every quarter) to the Strategic Lead for Social Value and Sustainable Procurement.

The purpose of reporting is both assurance and improvement: to evaluate performance against commitments, evidence social impact achieved, and capture learning to strengthen future delivery. Reports must combine quantitative metrics, qualitative insights, and policy compliance evidence, and explicitly set out lessons learned, risks or barriers encountered, and corrective or enhancement actions proposed for the next reporting period.

WMCA Internal Reporting

WMCA will produce the following reporting for relevant internal stakeholders:

Quantitative metrics based on TOMs/proxy values

a) Total delivered financial value for the period, in total, and by local authority area
b) Total delivered financial value as a percentage of total contract values, in total, and by local authority area
c) Committed/contracted financial value yet to be delivered, in total, and by local authority area
d) Cumulative financial value delivered by project, and where appropriate, by local authority area

Qualitative supplier commitments to our strategic priorities.

a) Spotlight success stories. Case studies of delivered social value projects, where possible, by local authority area, and suitable for wider communication
b) Evidenced reports on relationships cultivated and developed with local communities and organisations to harness their skills and knowledge, build capacity and capabilities

c) List of delivered social value projects mapped to regional strategic priorities, and where appropriate, by local authority area
d) List of committed/contracted social value projects mapped to regional strategic priorities, and where appropriate, by local authority area

Policy compliance and effectiveness

a) Number and value of above-threshold contracts containing specific social value obligations, by project, and where possible, by local authority area
b) Number and value of above-threshold tenders demonstrating consideration of contractual and organisational social value, by project, and where possible, by local authority area
c) List of committed/contracted social value projects mapped to the regional strategic priorities, where possible, by local authority area

11 Governance

The Strategic Lead for Social Value and Sustainable Procurement is the ultimate owner of the policy and is accountable for the dissemination, maintenance, and effectiveness of the policy. Responsibilities can be delegated appropriately.

Maintenance of the policy involves:

a) Updating the policy to reflect legislative or regulatory changes
b) Updating the policy to reflect organisational changes or significant changes to ways of working
c) Periodic continuous improvement review of the policy (24 months)
d) Ensuring that internal and external publication of the policy is up to date

The **Social Impact and Social Value Group**, reporting to the Corporate Services Group, will be responsible for:

a) Approving the policy and approving any subsequent material revisions.
b) Reviewing reports, determining any appropriate actions, and ensuring that such actions are completed.
c) Proactively championing social value across the authority, building awareness and support at all levels.

Compliance to policy will be conducted in accordance with the WMCA's internal compliance and auditing processes, via the relevant Governance Group. The policy owner is accountable for completion of agreed actions arising.

Appendices

Appendix 1: National Themes, Outcomes and Measures (TOMs)

The following sets out the chosen National TOMs (also known as Social Value TOMs) and how they align with our regional strategic priorities.

Core

In general, we expect Suppliers to deliver against the following CORE TOMs in accordance with the guidance set out in section 9.3

TOM	Description	Measure	Inclusive Growth	Growth Plan	Mayoral Priority
NT1	Local people employed or retained	No of people FTE	Inclusive economy	Business	Jobs for everyone
NT128	Local people with disabilities employed or retained	No of people FTW	Inclusive Economy	People	Jobs for everyone
NT3a	Long-term unemployed armed forces veterans recruited	No of people FTE	Equality	People	Jobs for everyone
NT4	Employees recruited who are NEET (16–24-year-olds)	No of people FTE	Inclusive economy	Business	Jobs for everyone
NT4a	Unemployed 16–25-year-old care leavers recruited	No of people FTE	Equality	People	Jobs for everyone
NT10a	Employment of new apprentices from designated groups (includes NEETs)	No of weeks	Education and learning	People	Jobs for everyone
NT18	Spend with local companies in the supply chain	£ spent	Inclusive economy	Business	Growth for everyone
NT19	Spend with local SMEs in the supply chain	£ spent	Inclusive economy	Business	Growth for everyone
NT20	Multidimensional wellbeing programme access for staff (includes supply chain employees)	No. employees provided access	Health and wellbeing	People	Growth for everyone
NT25	Initiatives to be taken to tackle homelessness	£ invested	Affordable and safe places	Place	Homes for everyone
NT26	Support for community health or wellbeing interventions	£ invested	Health and wellbeing	People	Jobs for everyone
NT28	Support for Local Community Projects through donations	£ invested	Power and Participation	People	Growth for everyone
NT29	Support for Local Community Projects through volunteering	Staff volunteer hours	Power and Participation	People	Growth for everyone

TOM	Description	Measure	Inclusive Growth	Growth Plan	Mayoral Priority
NT31a	Reductions in Scope 3 CO_2e emissions through decarbonisation	tCO_2e	Climate and environment	Place	Growth for everyone
NT63	Support for initiatives to help rough sleepers	Resources invested	Affordable and Safe Places	Place	Homes for everyone
NT80	Upskilling of existing employees through accredited training	No of weeks	Education and learning	People	Jobs for everyone
NT97	Digital literacy support for designated groups	Staff volunteer hours	Connected communities	Place	Jobs for everyone
NT119	Support for green spaces, biodiversity or ecosystems	Resources invested	Climate and environment	Place	Growth for everyone

Additional

These additional TOMs may be selected as required.

TOM	Description	Measure	Inclusive Growth	Growth Plan	Mayoral Priority
NT3	Long-term unemployed people recruited	No of people FTE	Inclusive economy	Business	Jobs for everyone
NT3c	Long-term unemployed mothers recruited	No of people FTE	Equality	People	Jobs for everyone
NT8	Support for students at local educational institutions	Staff volunteer hours	Education and learning	People	Jobs for everyone
NT13a	Meaningful paid work placements paying the Real Living Wage+	No of weeks	Education and learning	People	Jobs for everyone
NT14	Spend with VCSEs in the supply chain	£ spent	Inclusive economy	Business	Growth for everyone
NT24	Support for community initiatives to reduce crime	£ invested	Affordable and safe places	Place	Growth for everyone
NT27	Support for initiatives focused on strengthening community networks	£ invested	Power and Participation	Place	Growth for everyone
NT29a	Support for charities & community projects focused on positive health outcomes	Staff volunteer hours	Health and wellbeing	People	Jobs for everyone
NT39	Support for mental health awareness campaigns for staff	£ invested	Health and wellbeing	People	Jobs for everyone
NT52	Initiatives to promote more resilient communities	Resources invested	Affordable and Safe Places	Place	Growth for everyone
NT69	Expert support to VCSEs and SMEs for the adoption of circular economy solutions	Staff expert hours	Climate and Environment	Place	Growth for Everyone

TOM	Description	Measure	Inclusive Growth	Growth Plan	Mayoral Priority
NT72	Hard-to-recycle waste diverted from landfill/incineration	Tonnes diverted	Climate and environment	Place	Growth for everyone
NT86	Support for environmental conservation & ecosystem management	Staff volunteer hours	Climate and environment	Place	Growth for everyone
NT87	Reductions in plastics used	kg reduction	Climate and environment	Place	Growth for everyone
NT88	Reduce waste through reuse of products and materials	Tonnes	Climate and environment	Place	Growth for everyone
NT96	Personalised support to improve career and life skills	Duration x Attendees	Education and learning	People	Jobs for everyone
NT99	Support for enabling visits of school children or local residents	Staff volunteer hours	Connected communities	Place	Jobs for everyone
NT100	Employment taster days (project related, sector or industry)	£ invested	Connected communities	Place	Jobs for everyone
NT101	Spend with local ethnic minority-owned SMEs in the supply chain	£	Equality	People	Growth for everyone
NT102	Spend with local women-owned SMEs in the supply chain	£	Equality	People	Growth for everyone
NT103	Meet the buyer events showcasing supply chain opportunities	£ invested	Inclusive Economy	Business	Growth for Everyone
NT104	Personalised support to improve financial literacy (including budgeting)	Duration x Attendees	Education and learning	People	Jobs for everyone
NT105	Expert Equality, Diversity & Inclusion training	£ invested	Equality	People	Growth for everyone
NT112	Reductions in embodied CO2e	tCO2e	Climate and environment	Place	Growth for everyone

Appendix 2: Opportunities to increase contractual & organisational social value

a) **Examples of opportunities to increase contractual social value:**

- Early community engagement to shape and co-design the requirements
- Inclusion of requirements relating to accessibility (e.g. cycle lanes), environment (e.g. noise control measures), or employment (e.g. recruitment of people from disadvantaged groups). These could be expressed in the tender as part of the specification or as open questions that will form part of the evaluation and of the contract (e.g. “How will you…?)
- Requirements for works to be scheduled in a way that minimises disruption to the community, such as avoiding school drop-off/pick-up times
- Consideration of decommissioning and waste disposal requirements to minimise environmental impact or to create opportunities for local businesses
- Inclusion of metrics relating to, e.g. use of recycled materials, in KPIs and reporting requirements

b) **Examples of opportunities to increase organisational social value:**

- Breaking contracts down into lots: smaller suppliers may be able to deliver specific lots without needing to have the capability to deliver the full project
- Ensure that qualification criteria contained in tenders are proportionate to the contract. Disproportionately high insurance requirements or requirements for previous case studies can present unnecessary obstacles to smaller organisations
- Use outcome-based specifications. Smaller organisations can find it difficult to compete when requirements focus on technical inputs, but can use local knowledge and ingenuity to deliver impactful solutions
- Promote use of consortia and sub-contracting. Early communication and ongoing engagement can enable smaller organisations to submit joint bids, or to partner with larger organisations, to compete for contracts that they could not compete for alone.
- Most Advantageous Tender (MAT). The introduction MAT under the Procurement Act 2023 enables contracting authorities to evaluate bids based on overall social benefit, rather than narrow financial value, creating greater scope to engage social enterprises that deliver meaningful community impact. This should be reflected in contract award criteria.
- Consider use of the provision with the Procurement Act for contracts to be reserved for “supported employment providers.” (Organisations that operate wholly or partly for the purpose of providing employment, or employment-related support, to disabled or disadvantaged individuals.) PA23 section 32.

Appendix 3: Situations where it might be appropriate to adjust the weighting given to evaluation of additional social value

a) **It may be appropriate to lower the weighting in situations such as:**
   - Where a 20% weighting would disadvantage Social Enterprises, who exist to provide social value and who consequently would find it difficult to deliver additional social value beyond the core contract;
   - Where the nature of the contract and/or the supplier base restricts the scope for social value (e.g. where the supplier base consists of small niche technology providers)

b) **It may be appropriate to increase the weighting in situations such as:**
   - Where technical and cost aspects of suppliers' proposals are likely to be similar and where social value can be a differentiator;
   - Where social value can be a vehicle for innovation in a mature market;
   - To incentivise suppliers to think creatively about ways to support the local community where the core contract is focus on a deprived area

Glossary

SMEs: Small and Medium Enterprises

VCFSE: Voluntary, Community, Faith, and Social Enterprises

Goods: Referred to as 'supply of goods' in the Procurement Act 2023:

this includes:
- The purchase, lease, rental, or hire-purchase of tangible items.
- Can include associated services such as installation or maintenance if they are part of the contract.
Examples: IT equipment, medical supplies, vehicles, furniture.

Services: Defined broadly as contracts for the provision of services to a contracting authority in the Procurement Act 2023. This includes:

- Professional services (e.g. consultancy, legal, financial).
- Operational services (e.g. cleaning, catering, security).
- Digital and technology services (e.g. software development, cloud hosting).

Works:

Defined in the Procurement Act 2023 as contracts for the construction, repair, or maintenance of infrastructure or buildings. This includes:

- Civil engineering projects (e.g. roads, bridges).
- Building construction and renovation.
- Installation of facilities (e.g. plumbing, electrical systems).

Works contracts typically involve the execution of a project rather than just the supply of materials.

Contract Owner:

The person commissioning the work or responsible for delivery of the services with WMCA (e.g. Project manager, HR manager, IT manager)

Contract Manager:

The person responsible for managing the supplier and the contract post-award (e.g. performance, contract changes, commercial). In some cases, particularly for lower-value contracts, the Contract Owner and the Contract Manager will be the same person.

wmca.org.uk/social-value-policy

West Midlands
Combined Authority