



# Social Value and Sustainable Procurement Policy

<b>Document Reference:</b>	POL167
<b>Document Status:</b>	Approved
<b>Version:</b>	V1.0

## DOCUMENT CHANGE HISTORY

Initiated by	Date	Author (s)
Social Value Plan.	01/09/2025	Head of Procurement and Logistics
Version	Date	Comments (i.e., viewed, or reviewed, amended approved by person or committee)
Draft V0.1	19/08/2024	Circulated to Finance and Procurement team.
Draft V0.1- V0.5	14/08/2025	Changes to Policy following Procurement Act implementation Feb 25, publication of PPN002 Feb 2025 and Social Value Playbook July 2025 and as amended August 2025

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Final V0.6/7	21/08/2025	Stakeholder circulation
V0.8	01/09/2025	Submission to CRG Approved by CRG subject to minor amendment
V1.0	01/09/2025	Approval by CRG

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<b>Document Reference</b>	Directorate: Finance
<b>Recommended at Date</b>	CRG approved the Procurement Policy in August 2023, but further revision of the Policy was recommended by the Finance team prior to final submission of the Procurement Policy to ELT.  This new Policy will reduce the volume of content within the Procurement Policy and meet the requirements of the Social Value Plan, Procurement Act 2023, Social Value Model 2025, and new NHS Social Value Playbook.
<b>Approved at Date</b>	Compliance and Risk Group 01/09/2025
<b>Valid Until Date</b>	01/10/2027
<b>Equality Analysis</b>	18/08/2024
<b>Linked procedural documents</b>	Procurement Policy Procurement Manual Sustainability Strategy Green Plan 2021-2026 Social Value Model/PPN 002 Social Value Playbook
<b>Dissemination requirements</b>	All Trust staff engaged in buying activity and suppliers to the Trust.
<b>Part of Trust's publication scheme</b>	Yes

The East of England Ambulance Service NHS Trust has made every effort to ensure this policy does not have the effect of unlawful discrimination on the grounds of the protected characteristics of: age, disability, gender reassignment, race, religion/belief, gender, sexual orientation, marriage/civil partnership, pregnancy/maternity. The Trust will not tolerate unfair discrimination on the basis of spent criminal convictions, Trade Union membership or non-membership. In addition, the Trust will

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have due regard to advancing equality of opportunity between people from different groups and foster good relations between people from different groups. This policy applies to all individuals working at all levels and grades for the Trust, including senior managers, officers, directors, non-executive directors, employees (whether permanent, fixed-term or temporary), consultants, governors, contractors, trainees, seconded staff, homeworkers, casual workers and agency staff, volunteers, interns, agents, sponsors, or any other person associated with the Trust.

All Trust policies can be provided in alternative formats.

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## 1. What is Social Value

- 1.1 Social Value is the value an organisation contributes to society beyond a reported profit. The Trust delivers Social Value through a number of methods already, for instance through its CFR Volunteers and the Trust Charity and is often delivered without the Trust recognising what it is, or its full potential impact. However, social value can also be delivered by our Supply Chain and unlocking this value has enormous potential benefits.
- 1.2 Our health is shaped by the places we live, with social, environmental, and economic factors playing a critical role in people's long-term health. Applying social value provides NHS commissioning and buying teams the unique opportunity to improve patients' lives and the communities they live in through how we buy and the way we manage contracts. Social value in procurement drives the supply chain to deliver additional social, economic, and environmental benefits alongside their commercial commitments.
- 1.3 The Trust spends over £117 million on non-pay items each year. Consequently, there is a tremendous opportunity to reduce our impact on the environment through the products we buy and to influence our customers and suppliers to improve their social value and sustainability.
- 1.4 Social value, when incorporated effectively, will help reduce health inequalities, drive better environmental performance, and deliver even more value from procured products and services.
- 1.5 Social value is any additional economic, social, or environmental benefit generated through East of England Ambulance Service NHS Trust ("Trust") activity, including when procuring goods, works or services from the Trusts suppliers and the supply chain. In order to create these added-value benefits and improve on current practice, Trust procurement and our suppliers will plan how contracts and projects can deliver social value outcomes in a flexible, proportionate, and relevant way. This could be, for example, by:
  - Encouraging suppliers to spend money and invest locally.
  - Offering meaningful work placements in areas of high unemployment
  - Promoting equality and inclusion in the workforce, including through employment and support of staff with disabilities (physical, learning, hidden, etc.)

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- Sponsoring local community assets (such as village halls or playparks),
- Donating to or working with local charities, schools, social enterprises, etc.,
- Reducing carbon footprint over time, e.g. cycle to work programmes, public transport, or car-pooling programmes, etc.
- or increasing the commitment to reducing, recycling or composting waste; or creating green spaces to improve biodiversity.

1.6 Sustainability is fundamental to achieving the NHS's long-term strategy to deliver high-quality healthcare while minimising its environmental impact and promoting social responsibility. The NHS seeks to reduce carbon emissions, conserve resources, and ensure that goods and services are procured in a way that supports both environmental and social goals.

## 2. Introduction

2.1 The new Procurement Act, which came into force in February 2025, replaced most of the existing public sector procurement legislation.

2.2 The focus of the Act is to streamline and improve public procurement of supplies, services and works, while making it easier for suppliers to do business with the public sector. This involves making public procurement simpler and more transparent, as well as removing barriers to new entrants such as small businesses (SME's), voluntary, community, faith, and social enterprises. (VCSE's)

2.3 There is also greater emphasis on procurement as an enabler to deliver wider benefits for the public good – which is where Social Value comes in.

2.4 Value for money will of course remain a high priority, but national strategic priorities such as job creation, improving supplier resilience, reducing emissions, and driving innovation are also significant determining factors.

2.5 The significant difference for Social Value now the Act is in force lies with the legal requirement for public sector buyers to shift from awarding contracts based on M.E.A.T (Most Economically Advantageous Tender) to M.A.T. (Most Advantageous Tender).

2.6 This means considering the wider benefits for the community in which the contract will be delivered, such as creating local

employment opportunities, carbon emissions reduction or using a local supply chain – all of which naturally fall under the umbrella of Social Value.

- 2.7 As an NHS Trust within the NHS family, the procurement department have established this comprehensive Social Value and Sustainable Procurement Policy to articulate our commitment to delivering on our social responsibility in compliance with current legislation, which includes the Social Value Act 2012, the Procurement Act 2023, Provider Selection Regime 2024 and best practice within the Social Value Playbook.

### 3. Purpose

#### Objectives of this policy

- 3.1 To meet legal and statutory requirements build into the Social Value Act (2012), Public Procurement Notices (PPN's), Health Care Services (Provider Selection Regime) Regulations 2023 and Procurement Act (2023).
- 3.2 To support the delivery of the Trust's Sustainability Strategy.
- 3.3 To support the delivery of the Trust's Green Plan.
- 3.4 To support the delivery of the Trust's Social Value Plan.
- 3.5 To support delivery of the NHS Net Zero Supplier Roadmap
- 3.6 To consider our supply chains ability to contribute social value and to start to effectively measure the impact of that benefit.
- 3.7 To promote local employment and reduce economic inequality.
- 3.8 To promote equality and diversity in the supply chain.
- 3.9 To promote wellbeing in the supply chain.
- 3.10 To promote sustainability and carbon reduction.
- 3.11 To support supplier, and stakeholder understanding of social value and sustainability requirements within public sector procurement and the NHS and encourage best practice.

#### Aim of the Policy

- 3.12 The aim of this policy is to enable the Trusts spending to go further by encouraging suppliers to commit to providing additional social value that will benefit local communities within East of England. These additional economic, social, and environmental benefits will be provided by our suppliers during the contract or purchase delivery period and will contribute towards achieving the Trusts priorities as set out in our Sustainability Strategy and Social Value Plan.

3.13 The Trust recognises the importance of Good Corporate Citizenship and of promoting and maintaining elevated levels of environmental, social, and ethical conduct, and in doing so we will:

- Ensure all Trust procurement staff have sufficient training and are bound by the CIPS code of ethics whether they are members of the Chartered Institute of Procurement and Supply (CIPS) or not.
- Actively support the Net Zero targets on the Supplier Roadmap and supply chain.
- Ensure suppliers sign up to the Trust's 'Supplier Sustainability Agreement' which seeks to ensure contracted suppliers operate both ethically and sustainably.
- Ensure procurement is a force for good that helps local economies and improves wider determinants for health.
- Help eliminate modern slavery in the NHS Supply Chain both domestically and abroad and ensure The Trust Modern Slavery Statement is available on the Trust website.
- Ensure key people, procurement staff and suppliers receive training on the principles of sustainable procurement and how to apply these in practice.
- Communicate the Trust's Social Value and Sustainable Procurement Policy to all suppliers and appropriate stakeholders.
- Engage with suppliers to ensure that they are aware of the Trust's Social Value and Sustainable Procurement Policy and encourage them to improve and report upon their own environmental, social value and equality performance electronically.
- Review the sustainability risks associated with products and services and target high-risk /high-expenditure commodities.
- Include sustainability and equality considerations in the assessment of suppliers and contractors and their products and collaborate with suppliers and contractors to improve sustainable performance.
- Consider opportunities for ethical sourcing for instance Fair-trade, or equivalent, and ethically sourced and produced goods and services.
- Encourage all suppliers to submit an Evergreen Assessment.

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- Meet relevant statutory requirements and help set the standards for best sustainable purchasing practice.
- Seek assurance that high-risk/high-expenditure suppliers comply with all relevant legislation.
- Apply whole life costing to procurement decisions. Consider value for money in terms of durability, running costs, maintenance, and disposal costs rather than simply the initial purchase price.
- Consider the need to minimise emissions and reducing the negative impacts of transportation when purchasing goods and services.
- Share experience with others and promote good practice with respect to purchasing and sustainable development.
- Encourage all members of staff to question the need for new items and the quantities to be purchased.
- Consider opportunities for products that are made from recycled materials and products derived from reclaimed materials and/or recyclable at the end of life.
- Select products / services that have minimal effect on the depletion of natural resources and biodiversity.
- Consider opportunities for products which can be operated in an energy efficient manner and/or without wasting water.
- Consider opportunities for using recycled items or for recycling items (e.g. furniture or similar goods) internally within the Trust and across the Southern Alliance.
- Ensure the results of sustainable procurement activities are measured and reported to all relevant stakeholders.
- To ensure that procurement activity aims to reduce avoidable inequalities and improves health and wellbeing across its community.
- Work more effectively with diverse suppliers and ensure that local enterprises are encouraged to bid for the Trust's business.
- Take steps to minimise carbon dioxide and other greenhouse gas emissions through the detailed consideration of products and services procured.
- Consider the environmental performance of all suppliers and contractors and encourage them to conduct their operations in an environmentally sensitive manner.

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- Comply with all UK legislation and ensure our suppliers do likewise.
- Conduct at minimum a bi- annual review of the success of the policy.

### **4. Scope**

- 4.1 This Policy applies to all procurement activity on third-party contracts and single purchases by the Trust procurement team.
- 4.2 Beyond our organisation, the Trust is also committed to explore greater working with partner organisations, including the NHS through National, Regional and Local initiatives that include National Ambulance Procurement members, the Southern Alliance and Local ICS Boards, Fire and Police to increase the amount of social value delivered collectively by public sector organisations through mutual collaborations.

### **5. Roles and Responsibilities**

- 5.1 The Assistant Director of Procurement and Logistics has overall accountability for this policy and will ensure that it is adopted within all departments and services across the Trust.
- 5.2 All employees of the Trust who procure goods and services have a responsibility for delivering the objectives contained within this policy.
- 5.3 The Procurement team will assist members of staff to consider and balance their requirements against sustainability outcomes.
- 5.4 Those staff with contract management responsibilities are responsible for ensuring the contractual delivery of social value commitments made by suppliers over the life of the contract.

### **6. Context.**

- 6.1 The Public Services (Social Value) Act 2012 put an obligation on public sector bodies to consider social value in the procurement of goods, services, and works. Following this, Procurement Policy Note (PPN) 06/20 was designed to create a standardised and complete approach to assessing and incorporating social value in procurement for Central Government from January 2021 providing guidelines through publication of The Social Value Model.

- 6.2 NHSE adopted this PPN and mandated that NHS organisations include a minimum 10% weighting for social value in all procurement activity from April 2022 through their 'Applying net zero and social value in the procurement of NHS good and services' guidance.
- 6.3 This was reinforced by PPN 06/21 which redoubled the NHS intent to become the world's first net zero healthcare provider and how this can be done via the leverage of procurement to encourage the decarbonisation of NHS suppliers.
- 6.4 Under the Health and Care Act 2022, NHS organisations are obliged to consider and be compliant with the UK Climate Change Act 2008 and the Environment Act 2021 , and must 'adapt to any current or predicted impacts of climate change' when procuring works, goods, and services, and when commissioning healthcare services.
- 6.5 In February 2025, the Government published five areas of focus to drive mission-based procurement in public services with a view to delivering ambitious, long term and measurable objectives. The National Procurement Policy Statement published in February 2025 calls for contracting authorities to deliver social and economic value, supporting the five missions and working in partnership across organisational boundaries. Social value outcomes should be co-designed and considered throughout the commercial lifecycle.
- 6.6 The Social Value Model 2025 has refreshed the objectives and key themes to align with the new five missions which now include;
- Kick starting economic growth.
  - Make Britain a clean energy superpower.
  - Take back our streets.
  - Break Down barriers to opportunity.
  - Build an NHS Fit for the Future.
- 6.7 The Provider Selection Regime (PSR) sets out the rules for procuring healthcare services in England from 1<sup>st</sup> January 2024. Social Value is one of the five key decision-making criteria for selection and again must account for a minimum 10% weighting.
- 6.8 Climate change threatens health; nine of the ten hottest years recorded have occurred in the last decade and almost nine hundred people were killed by heatwaves nationally in 2019. An estimated four thousand deaths occur per year due to air pollution in London alone. Therefore, slowing and stopping climate change is essential to retaining good health in the population.

- 6.9 NHS emissions make up 4% of England's carbon footprint, with more than 60% of these emissions originating from the supply chain. Therefore, reducing NHS carbon emissions is integral to reaching the UK's carbon neutral goal, whilst also improving the populations health, as such the NHS has set two goals:
- Reach net zero carbon emissions by 2040 for emissions controlled directly – known as the NHS Carbon Footprint. This includes an aim for an 80% reduction by 2028 to 2032.
  - Reach net zero carbon emissions by 2045 for emissions the NHS can influence – known as the NHS Carbon Footprint Plus. This includes an aim for an 80% reduction by 2036 to 2039.
- 6.10 To close the gap to become net zero the NHS must remove 6.1 MtCO<sub>2</sub>e (million tons of carbon dioxide equivalent) from the NHS Carbon Footprint and 24.9 MtCO<sub>2</sub>e from the NHS Carbon Footprint Plus (this is equivalent to the emissions profile of Croatia).
- 6.11 NHS and social care organisations serve as anchors in their local communities. They are embedded within their communities and have a significant economic contribution both as an employer and as a purchaser. A considerable proportion of health and social care carbon emissions come from the estimated £52bn of health-based non-pay spend. Improving the impact of health and care delivery on the environment, society and the economy can generate direct financial benefits to organisations as well as impact wider economic improvements, all of which contribute to the wider determinants of health.
- 6.12 The Trust Sustainability Enabling Strategy focuses on four key areas;
- Maximising opportunities for sustainable practices
  - Supporting strategic sustainable initiatives
  - Embedding the Trust in the community.
  - Staff wellbeing and welfare.
- 6.13 This Policy ensures that these four key priorities are driven through procurement to our supply chain, that we comply with current legal requirements, grow our local economy and improve environmental outcomes through our contracts. This Policy aligns with our Sustainability Strategy, as well as Trust Green and Social Value Plans.

## 7. Unlocking Social Value. Procurement and Contract Management.

- 7.1 Purchasers are advised to consider environmental and sustainability issues as early as possible at the business case stage, as this is where the strongest opportunities for achieving sustainable procurement can be found. This means determining the Social Value themes in collaboration with operational leads, subject matter experts and suppliers. The recommendation is to focus no more than two themes unless the weighting used is to be more than 10%.

### Stage 1 – Identify the need.

- 7.2 All procurement of goods works and services for the Trust must be conducted in accordance with UK and international legislation. The Trust operates under the Standing Financial Instructions (SFI's) and Scheme of Delegation (SoD) which can be found on the Trust's intranet site.
- 7.3 The process of identifying the need is the most key point in the procurement process for considering environmental and sustainability issues. Stakeholders may want to question whether the purchase is essential or could use be made of an existing product or a more environmentally friendly product or service.
- 7.4 Collaborating with potential suppliers at this stage can be beneficial and lead to, for example, reduced or returnable packaging, minimised road transport and more environmentally friendly production processes and good/ethical workforce practices.
- 7.5 Early supplier engagement allows the Trust to consider how its Suppliers/ Contractors can improve the environmental qualities of products and manufacturing processes, both of which are likely to have a positive effect on whole life costs and hence value for money.
- 7.6 Stakeholders must be cautious to not over involve or accept the views of suppliers in determining the Trust's needs. The Specification must be generic and not supplier / product specific.
- 7.7 Sustainable procurement practices to reduce carbon footprints, minimise waste and promote green technologies must be included in all NHS contracts through either the technical specification where a supplier can demonstrate a reduction in Scope 1, 2 or 3 emissions or dedicated social value questions.

## Stage 2 – Specification

- 7.8 Careful consideration needs to be given to the way in which goods and services are specified in Tender documents and Quotation requests.
- 7.9 Legislation requires that the Trust does not indulge in anti-competitive or restrictive practices. To exclude certain sources of supply may be deemed anti-competitive or restrictive. The Trust can specify positive requirements that are:
- Applied equally to all Tenderers.
  - Appropriate and relevant to the Goods / Services required.
  - Specified in the Tender documents if going to tender.
  - Not anti-competitive or specify branded products.
  - Not non-commercial.
- 7.10 When writing a Specification, consideration should be given to the Goods and / or Service over their lifecycle. The following can be used as a checklist to identify the potential sustainable development impacts of the goods / service stakeholders are procuring:
- Specify the use of sustainably sourced materials.
  - Specify the conditions for the disposal of packaging and the goods at the end of their use / life.
  - Specify ethical workforce practices in the production/supply chain.
  - Decrease transport impacts.
  - Use of recycled materials and / or materials which can easily be re-used or recycled at the end of their life.
- 7.11 The Procurement Act 2023 encourages pre-market engagement. It is a fundamental opportunity to understanding the art of the possible in social value relevant to the opportunity.
- 7.12 However, the details of any pre-market engagement must be shared with all bidders and where conducted a transparency notice must be issued. If stakeholders therefore intend to conduct pre-market engagement of any kind, they must inform the procurement team.
- 7.13 Bidders due to take part in any large tender exercises (Over threshold) may be invited to attend a meeting to learn more about social value bidding, prior to the tender going live and to discuss the specific requirements to be included within the tender pack.

- 7.14 Lower value procurements may not have capacity to conduct individual engagement activities, but existing market analysis information and/or category-specific intelligence will be used to inform the approach to social value in the tender.
- 7.15 Effective market engagement can help identify whether the planned social value evaluation methodology is relevant, proportionate, and achievable and can help shape the award criteria and evaluation question(s) when considered alongside the social value priorities and procurement objectives and outcomes.
- 7.16 The Social Value Playbook will be used for guidance and support.
- 7.17 Where social value priorities and/or questions cannot be agreed pre-tender, market engagement will be conducted to determine and agree relevant themes and outcomes. Stakeholders will need to build additional time into tender timelines to take account of the possible need for pre-tender supplier engagement.

### **Stage 3 – Choosing Suppliers**

- 7.18 In choosing suppliers, care must be taken to ensure all potential suppliers are treated fairly and that they are each assessed using the same criteria. Suppliers may be rejected if they have been found guilty of a criminal offence, concerning professional conduct, or if they have been guilty of grave professional misconduct such as fraud, or have connections to someone convicted of fraud and which can be proven. There is an opportunity to consider environmental matters in both cases.
- 7.19 For contracts over threshold, the Trust may use a pre-qualification questionnaire / selection questionnaire (SQ) that includes a section of questions on environmental and social/ workforce matters, such as Modern Slavery. Potential suppliers should demonstrate that they have a serious commitment to protecting the environment in their systems and processes. This could either be by holding or working towards recognised standards such as ISO14001 Environmental Management Standard.
- 7.20 Potential suppliers can be asked to demonstrate their environmental technical competence, particularly where this is relevant to the subject of the contract, for example in construction or waste disposal contracts. In this case we can ask for specific knowledge or experience, descriptions of systems and processes for quality assurance and an indication of any environmental measures currently in place. Site visits can also be conducted.

- 7.21 Care needs to be taken to ensure that all candidates are treated fairly. Remember to ensure that any evidence asked for is directly linked to the subject of the contract and ensure that information is only asked for on general policies where these have a direct effect on the suppliers' ability to perform the contract.

#### **Stage 4 – The consideration of social value in tenders**

- 7.22 There is a legal requirement to be transparent with suppliers when conducting a procurement for a public contract, including in respect of the award criteria and assessment methodology used. The Trust are under a duty to have regard to the importance of sharing information for the purpose of allowing suppliers and others to understand the authority's procurement policies and decisions.
- 7.23 NHS England have determined that NHS Trusts must use the social value model to support the delivery of social value. The initial Model introduced in 2020 consisted of five themes: Covid19 recovery, tackling economic inequality, Fighting climate change, Equal opportunity, and Wellbeing.
- 7.24 In 2025 PPN 002 introduced new themes that apply to all new above threshold tenders from October 2025; Kick Start Economic Growth, Make Britain a clean energy superpower, Taking back our streets, Breaking down barriers to opportunity and Building an NHS fit for the future.
- 7.25 Tenders prior to October 2025 will use the initial Social Value Model and those after October 2025 will use the new Model.
- 7.26 As part of the assessment of the most advantageous tender, there are menus of model award criteria (MAC) and sub-criteria for each of the policy outcomes in the Social Value Model ('the model'). From these, stakeholders in conjunction with procurement can select those which are relevant and proportionate to the subject matter of the contract.
- 7.27 To allow evaluators to objectively assess the tender against the model award criteria, the model also includes:
- a model question, with standard award criteria for assessing the method statement and implementation plan, and
  - model award criteria and sub-criteria for each outcome.
- 7.28 The model award criteria and sub-criteria tells suppliers what the Trust is looking for in tender responses and provides the

evaluation panel with the criteria they will use to assess the quality of the tender in a consistent, fair, and transparent manner.

- 7.29 The model question and model award criteria and sub-criteria are outcomes and outputs-focused to allow flexibility for innovative responses and prevent barriers to entry for start-ups, SMEs, VCSEs and mutuals by allowing suppliers to offer solutions that they can integrate into their operating model for the contract.
- 7.30 Wherever possible the model award criteria and sub-criteria will be used but if appropriate, procurement can adjust the model award criteria and sub-criteria, model questions and model response guidance to:
- ensure relevance and proportionality to the subject matter of the contract.
  - respond to intelligence gained through preliminary market engagement, or details of local economic growth plans, or local social value needs (for example to address a local skills gap)
  - ensure compliance with fair treatment and non-discrimination, and/or to
  - satisfy/achieve specific departmental policy objectives.
- 7.31 The Supplier Questionnaire (currently PPN 03/24) or Conditions of Participation will be used where relevant to ensure that bidders meet the requirements of PPN 06/21 (Taking account of Carbon Reduction Plans in the procurement of major government contracts and PPN 02/23 (Tackling Modern Slavery in Government Supply Chains)
- 7.32 The Trust will include a minimum 10% social value weightings in all tenders regardless of value but only use the Social Value Model for tenders over the relevant threshold.
- 7.33 One of the social value questions in every tender, regardless of value will relate to reducing carbon emissions. (in compliance with PPN 06/21)
- 7.34 Under threshold, bidders will be asked to respond purely to qualitative questions.
- 7.35 In establishing any Framework Agreements, the Trust will reference all social value themes within the framework documentation, making it clear to suppliers and buyers there is flexibility, where relevant and proportionate, at call off. Inclusion of social value themes at framework outset will impact what themes and questions can be tested at call-off.

- 7.36 Where testing social value is required in the call-off procedure/mini-competition, as framework owner the Trust will ensure there is clear and transparent information available to buyers detailing how social value has been approached at framework agreement level, including relevant themes and Model Award Criteria. Buyers must check with the framework owner how social value has been managed.
- 7.37 Where a framework agreement permits direct award, the supplier will be bound by a commitment to deliver social value, entered into when accepting a place on the framework. As part of a direct award procedure, the buyer and supplier should jointly agree on the specific social value policy outcomes and award criteria to be delivered and included as part of the contract. The buyer should then evaluate the supplier's delivery against these policy outcomes and award criteria as part of ongoing contract performance management.
- 7.38 Where purchases are compliantly made directly with a supplier outside of a framework or competitive process, i.e. via waiver, commissioners and buyers are encouraged to discuss social value policy outcomes and award criteria with the supplier, ensuring KPIs are included in the ongoing contract performance management.
- 7.39 Due to the complex nature of medicines procurement in the NHS and the legal imperative of supply, social value is addressed through medicines procurement by requiring all suppliers to annually submit an Evergreen Sustainable Supplier Assessment.

#### **Stage 5 – Awarding the contract.**

- 7.40 The award criteria must be relevant to the subject of the contract. Stakeholders and purchasers should ensure that any environmental considerations are built into the Tender specification at the earliest possible stage.
- 7.41 A full explanation of the full evaluation criteria must be defined for all Tenders undertaken within UK procurement law in the Tender advertisement, and within the Tender documentation.
- 7.42 Section 19 of the Procurement Act provides public sector bodies must award based on 'the most advantageous Tender' (M.A.T.). This allows the evaluation of bids using a range of criteria for example: cost, quality, technical merit, aesthetic, and functional characteristics and running costs, all of which can have a direct

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impact on the environment. In assessing bids, the 'whole life cost' of Goods / Services will be considered.

7.43 The qualitative aspects of tenders will be evaluated according to the following matrix.

Score (0-4)	Score %	Classification
4	100%	<b>Excellent</b> - Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirements and provides comprehensive and clear details of how Social Value offers made will be delivered. The response provides a high level of certainty that the Bidder will deliver their Social Value commitments.
3	75%	<b>Good</b> - Response is relevant and good. The response addresses all requirements and is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled but includes some ambiguity or minor inconsistencies as to how Social Value offers made will be delivered. The response provides some confidence that the Bidder will deliver their Social Value commitments.
2	50%	<b>Satisfactory</b> - Response is relevant and fair. The response addresses all requirements and demonstrates a fair understanding of the requirements but lacks details on how certain Social Value offers made will be delivered or contains some inconsistencies. Alternatively, the response fails to address all the requirements. The response provides some concerns that the Bidder will deliver the Social Value commitment.
1	25%	<b>Poor</b> - Response is partially relevant but generally poor. The response addresses all requirements but contains insufficient/limited detail or explanation to demonstrate how the requirements (or any of them) will be fulfilled or contains major inconsistencies. Alternatively, the response fails to address the majority of the requirements. The response provides significant reservations that the Bidder will deliver the Social Value commitment.
0	0%	<b>Unacceptable</b> - No response submitted, or response fails entirely to demonstrate an ability to meet any of the requirements.

- 7.44 Under the model stakeholders assess and score the quality of the social value offered in the tender against the selected policy outcome/s at assessment stage (whether intermediate or final), in the same way as they would do for any other award criteria designed to assess quality. Although stakeholders will ask the supplier to state the quantity of what they commit to deliver (and include the resultant offer as a commitment in the contract), the assessment is qualitative, scoring how the method statement and implementation plan meet the award criteria and sub-criteria (only) - volumes are not evaluated.

### **Stage 6 – Managing the contract.**

- 7.45 The contract forms the agreement that both parties (the Trust and the supplier / contractor) work together for continuous improvement and mutual benefit. The process of contract management involves monitoring the suppliers' performance against the standards laid down in the contract conditions and specification.
- 7.46 Contract conditions can be used to set environmental and / or sustainability and social value targets for performance of the contract, whereby the supplier and customer can work together on continuous improvement in performance. The supplier will make specific contract commitments which align to the social value model such that each commitment is measurable.
- 7.47 Care must also be taken to ensure that the Procurement Act 2023 is adhered to as well as compliance to the Trusts' Standing Orders and Standing Financial Instructions.
- 7.48 Stakeholders that conduct contract management will need to be mindful of the social value commitments made during the tender process and support the delivery of this area of contractual performance.

### **Stage 7 – Life Cycle Analysis**

- 7.49 There has been a massive increase in procuring goods that have been sourced sustainably, that are energy efficient during use and can be recycled at the product's end of life. However, it is the stakeholder's responsibility to specify and purchaser's responsibility to buy these goods in the first place and to ensure that they are used and disposed of as they were intended. It takes both producers and purchasers to be responsible for a product's 'life cycle'.

7.50 The main environmental impacts of products occur at different times throughout their lifecycle. For some products, such as a plastic chair, the main impacts arise in the production and disposal whereas a fridge or freezer, which uses electricity, has impacts all the way through its life.

## Stage 8 – Whole Life Costs

7.51 A life cycle analysis considers the total cost of a purchase, not just the immediate price. It takes a number of factors into consideration not just the initial purchase price. The following factors must be taken into consideration:

- Direct running costs. Energy, water, and other resources used over the lifetime of the product/service.
- Indirect costs. Less energy efficient IT equipment will produce more heat causing units in air-conditioned buildings to work harder, thus increasing the electricity bill.
- Administration costs. Overheads from purchases requiring special handling and disposal (i.e. pesticides and cleaning products).
- Spending to save (invest to save). Buying more durable or energy efficient products which may initially be more expensive but results in long-term savings.
- Training. Time, money, and effort spent training staff to operate products if they are not user friendly.
- Recycling capability. Purchasers can create markets for their own waste by buying products containing recycled materials (i.e. paper, remanufactured toner cartridges etc).
- Repairability. Ensuring that replacement parts are readily available and products are easily repairable.
- Specifying refurbished products. Purchasers can buy refurbished products / parts rather than insisting on new items where it is safe to do so and does not compromise patient or staff safety.
- Cost of disposal. It may be worthwhile to pay a premium to a supplier to remove the product or hazardous substance at the end of its life.
- Disposal options. A dedication and commitment from all to.
  - Reduce - Only buy when necessary.
  - Re-use - Have systems in place whereby items such as furniture, equipment and other office related goods

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can be re-allocated within the Trust, instead of being discarded.

- Recycle - Specify to suppliers that they should operate a system to take back any packaging and unwanted/spent items which can be recycled or re-used.

7.52 The procurement methodology outlined is designed to comply with legal requirements and unlock the social value within our supply chains and enhance the benefits for patients within East of England.

Appendices

Appendix A - Equality Impact Assessment

<b>EIA Cover Sheet</b>	
Name of process/policy	Social Value and Sustainable Procurement Policy.
Is the process new or existing? If existing, state policy reference number	New
Person responsible for process/policy	Head of Procurement and Logistics
Directorate and department/section	Finance- Procurement and Logistics.
Name of assessment lead or EIA assessment team members	Head of Procurement and Logistics
Has consultation taken place? Was consultation internal or external? (please state below):	<p>The Social Value Plan and TOMS were considered through wide consultation with stakeholders as follows.</p> <p>Head of Procurement and Logistics</p> <p>Deputy Director Procurement and Logistics.</p> <p>Procurement Services Manager</p> <p>Environment and Sustainability Manager</p> <p>Head of Commercial Services</p> <p>Chief of Clinical Operations</p> <p>Non-Executive Director</p> <p>Deputy Director of Strategy</p> <p>Head of Strategic Workforce Planning</p> <p>Non-Executive Director</p> <p>Senior Paramedic (Union Rep)</p> <p>Head of Estates</p> <p>Soft Facilities Manager</p> <p>Associate Director for UEC</p> <p>Deputy Director of Commercial Services</p> <p>Deputy Director of Finance</p> <p>Deputy Chief of Clinical Ops</p> <p style="padding-left: 40px;">Head of Commercial IM&amp;T Digital Services</p> <p>Deputy Director of Workforce</p>

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	Head of Resourcing and Shared Services		
	Recruitment Administrator 1st		
The assessment is being made on:	Guidelines		
	Written policy involving staff and patients		
	Strategy		
	Changes in practice		
	Department changes		
	Project plan		
	Action plan		
	Other (please state)		
	Social Value and Sustainable Procurement Policy		

<h2>Equality Analysis</h2>																					
<p>What is the aim of the policy/procedure/practice/event?</p> <p>To support the delivery of the Trusts Sustainability Strategy and Social Value Plan and to consider the whole life cycle impacts of its products in relation to Social Value and sustainability.</p>																					
<p>Who does the policy/procedure/practice/event impact on?</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 25%;"><b>Race</b></td> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 25%;"><b>Religion/belief</b></td> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 25%;"><b>Marriage/Civil Partnership</b></td> <td style="width: 5%;"><input type="checkbox"/></td> </tr> <tr> <td><b>Gender</b></td> <td><input type="checkbox"/></td> <td><b>Disability</b></td> <td><input checked="" type="checkbox"/></td> <td><b>Sexual orientation</b></td> <td><input type="checkbox"/></td> </tr> <tr> <td><b>Age</b></td> <td><input type="checkbox"/></td> <td><b>Gender re-assignment</b></td> <td><input type="checkbox"/></td> <td><b>Pregnancy/maternity</b></td> <td><input type="checkbox"/></td> </tr> </table>				<b>Race</b>	<input type="checkbox"/>	<b>Religion/belief</b>	<input type="checkbox"/>	<b>Marriage/Civil Partnership</b>	<input type="checkbox"/>	<b>Gender</b>	<input type="checkbox"/>	<b>Disability</b>	<input checked="" type="checkbox"/>	<b>Sexual orientation</b>	<input type="checkbox"/>	<b>Age</b>	<input type="checkbox"/>	<b>Gender re-assignment</b>	<input type="checkbox"/>	<b>Pregnancy/maternity</b>	<input type="checkbox"/>
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<b>Age</b>	<input type="checkbox"/>	<b>Gender re-assignment</b>	<input type="checkbox"/>	<b>Pregnancy/maternity</b>	<input type="checkbox"/>																
<p>Who is responsible for monitoring the policy/procedure/practice/event?</p> <p>Head of Procurement and Logistics</p>																					
<p>What information is currently available on the impact of this policy/procedure/practice/event?</p> <p>A series of social value workshops were conducted between April 2024 and August 2024 with various stakeholders invited to confirm their social value priorities and formulate a social value plan. This plan outlines a number of actions related to procurement and other stakeholders.</p> <p>Similar Policies from other NHS Trusts have been reviewed in the process of writing this Policy. The Policy has been written to ensure it complies with UK procurement law and current best practice.</p>																					
<p>Do you need more guidance before you can make an assessment about this policy/procedure/ practice/event? No</p>																					
<p>Do you have any examples that show that this policy/procedure/practice/event is having a positive impact on any of the following protected characteristics? Yes/No, If yes please provide evidence/examples:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 25%;"><b>Race</b></td> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 25%;"><b>Religion/belief</b></td> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 25%;"><b>Marriage/Civil Partnership</b></td> <td style="width: 5%;"><input type="checkbox"/></td> </tr> <tr> <td><b>Gender</b></td> <td><input type="checkbox"/></td> <td><b>Disability</b></td> <td><input checked="" type="checkbox"/></td> <td><b>Sexual orientation</b></td> <td><input type="checkbox"/></td> </tr> <tr> <td><b>Age</b></td> <td><input type="checkbox"/></td> <td><b>Gender re-assignment</b></td> <td><input type="checkbox"/></td> <td><b>Pregnancy/maternity</b></td> <td><input type="checkbox"/></td> </tr> </table> <p>Please provide evidence:</p> <p>Race/Age/Gender/Religion/Gender re-assignment/Marriage/Civil Partnership/Sexual Orientation/Pregnancy; Positive- The Policy is to be used by all staff.</p>				<b>Race</b>	<input type="checkbox"/>	<b>Religion/belief</b>	<input type="checkbox"/>	<b>Marriage/Civil Partnership</b>	<input type="checkbox"/>	<b>Gender</b>	<input type="checkbox"/>	<b>Disability</b>	<input checked="" type="checkbox"/>	<b>Sexual orientation</b>	<input type="checkbox"/>	<b>Age</b>	<input type="checkbox"/>	<b>Gender re-assignment</b>	<input type="checkbox"/>	<b>Pregnancy/maternity</b>	<input type="checkbox"/>
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<b>Age</b>	<input type="checkbox"/>	<b>Gender re-assignment</b>	<input type="checkbox"/>	<b>Pregnancy/maternity</b>	<input type="checkbox"/>																
<p>Are there any concerns that this policy/procedure/practice/event could have a negative impact on any of the following characteristics? Yes/No, if so, please provide evidence/examples:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 25%;"><b>Race</b></td> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 25%;"><b>Religion/belief</b></td> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 25%;"><b>Marriage/Civil Partnership</b></td> <td style="width: 5%;"><input type="checkbox"/></td> </tr> <tr> <td><b>Gender</b></td> <td><input type="checkbox"/></td> <td><b>Disability</b></td> <td><input checked="" type="checkbox"/></td> <td><b>Sexual orientation</b></td> <td><input type="checkbox"/></td> </tr> <tr> <td><b>Age</b></td> <td><input type="checkbox"/></td> <td><b>Gender re-assignment</b></td> <td><input type="checkbox"/></td> <td><b>Pregnancy/maternity</b></td> <td><input type="checkbox"/></td> </tr> </table>				<b>Race</b>	<input type="checkbox"/>	<b>Religion/belief</b>	<input type="checkbox"/>	<b>Marriage/Civil Partnership</b>	<input type="checkbox"/>	<b>Gender</b>	<input type="checkbox"/>	<b>Disability</b>	<input checked="" type="checkbox"/>	<b>Sexual orientation</b>	<input type="checkbox"/>	<b>Age</b>	<input type="checkbox"/>	<b>Gender re-assignment</b>	<input type="checkbox"/>	<b>Pregnancy/maternity</b>	<input type="checkbox"/>
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Please provide evidence:

Disability. Whilst the contents of the Policy do not have a negative impact on persons with a disability, as with all written control documents there may be a negative impact due to the format of the control document that is available. Documents are published on the intranet taking consideration of visual impairment including larger print. Visual impairment – however, this may not be suitable for all readers and therefore an alternative format may be required. Learning disability - The documents may also not be understood by those who have difficulty deciphering or reading the written word, for example, dyslexia. Therefore, further explanation and support may be required. Braille and audio versions are not currently available.

The Policy aims to support disadvantaged groups including disabled people into work and have a positive influence in the communities in which we operate.

### **Action Plan/Plans**

**Once approved the format will be amended to ensure an approved version is available on the Trust intranet site in line with other Policies available on the site.**

### **Evaluation Monitoring Plan/how will this be monitored?**

The contents of the Policy have no disproportionate impact on the grounds of race, gender, age, sexual orientation, religious belief, or gender re-assignment. The Policy is applicable to all members of staff equally and is designed to assist suppliers, stakeholders, procurement staff and Finance Directorate staff in understanding social value and applying it to Trust purchases.

Reviewed and updated by the Head of Procurement and Logistics at renewal intervals.  
Reported to Director of Finance.

Appendix B – Monitoring Table

**Template for Monitoring Table**

Use this template to show the monitoring process of the document.

What	Who	How	Frequency	Evidence	Reporting arrangements	Acting on recommendations	Change in practice and lessons to be shared
What key element that need monitoring	Role or group who will lead on this aspect of monitoring?	What tool will be used to monitor/ check/ observe/ assess/ inspect/ authenticate that everything is working according to this key element.	How often is monitoring needed? How often should a report be completed? How should a report be shared?	What type of evidence will be presented.	Who or what committee will the completed report go to and how will this be monitored.  How will each report be interrogated to identify the required actions and how thoroughly should this be documented in e.g. meeting minutes.	Which committee, department or lead will undertake subsequent recommendations and action planning for any or all deficiencies and recommendations within reasonable timeframes?	How will system or practice changes be implemented lessons learned and how will these be shared.
Changes to procurement practice including new PPN's or National Procurement Statement.	Head of Procurement will update the Policy in line with any changes in best practice.	Deputy Director of Procurement and Logistics review.	Annual	CCIAF Best practice changes NHSE Guidance Changes to National Procurement Policy Statement or legal changes.	CRG will be advised of any required updates caused by changes to the National Procurement Policy Statement or best practice guidance.	Head of Procurement and Logistics and Deputy Director of Procurement and Logistics will act on any recommendations and ensure trust compliance.	The procurement team will review challenges to the procurement process, the impact of the Policy, share best practice and lessons learned through the lessons Learned function within the procurement team
Delivery of social value benefits and supplier commitments/KPI's	Contract Managers/ Procurement Team	Contract meetings with Suppliers/SRM meetings	As per contractual requirement.	Contract management reports/supplier reports.	As per contractual requirements in line with the Contract Management Policy.	Head of Procurement will highlight any areas of non-compliance. Deputy Director of Procurement and Logistics will act on any recommendations and ensure trust compliance.	Deputy Director of Procurement and Logistics will review adequacy of contract managements and staff structure and report through Deputy Director Group.

Appendix C - Definitions

CFR Volunteer	Community First Responder volunteer
CIPS	Certificate in Purchasing in Supply. MCIPS Chartered Status being the internationally recognised qualification for procurement professionals
Competition	Procurement should be through an open competition unless there are exceptional reasons.
Competitive Flexible Procedure	Means the procedure designed by the Trust, which the Trust considers appropriate for awarding a public contract.
Diverse Suppliers	Micro, small, and medium sized enterprises, minority ethnic owned enterprises, those with majority ownership from a group protected by legislation and Third Sector organisations.
Ethical Standards	Procurement must be undertaken to the highest ethical standards and fairness to suppliers
Evergreen Assessment	the NHS Evergreen Assessment is a tool used to evaluate the sustainability efforts of organisations aiming to secure and retain NHS procurement opportunities. Hosted within the NHS tendering portal- (Atamis)
Framework Agreement	This is a type of agreement setting out broad conditions for organisations to buy from without giving any kind of commitment to quantities. A Framework Agreement will offer a category of goods, works or services to several organisations that have been named. The named organisations can then buy (call off) from a Framework Agreement by either going directly to a suitably qualified supplier, or via further Competition.

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	<p>When using Framework Agreements, always ensure the supplier you use is specified in the appropriate Lot.</p> <p>If direct award is made, the Trust must be able to evidence that the supplier who is most economically advantageous has been awarded.</p>
Modern Slavery	<p>When an individual is exploited by others, for personal or commercial gain. Whether tricked, coerced, or forced, they lose their freedom. This includes but is not limited to human trafficking, forced labour and debt bondage.</p>
Net Zero Target	<p>A net-zero target refers to a commitment to achieve a balance between the amount of greenhouse gas emissions produced and the amount removed from the atmosphere. This means that the total emissions from all sources must be zero, either through direct reductions or through removals such as carbon capture and storage.</p>
NHS England (NHSE)	<p>Leads the NHS in England and aims to provide high quality healthcare services for all.</p>
Public Procurement Notice (PPN)	<p>A Public Procurement Note (PPN) is a document issued by the UK government that provides guidance to public sector bodies in the procurement of goods or services. These notes aim to ensure transparency in the procurement process and promote ethical tendering practices. PPNs are mandatory for the NHS when sourcing goods or services and are used to inform and guide procurement teams on how to procure goods, services, and work in a fair and unbiased way.</p>
Procurement Act 2023 (PA23)	<p>For contracts awarded, framework agreements concluded, call-offs of</p>

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	framework agreements concluded, or dynamic markets established or procurement that commenced after 24 February 2025.
Provider Selection Regime 2023 (PSR)	The Provider Selection Regime (PSR) came into force on 1 January 2024, as part of regulations made under the Health and Care Act 2022. It is a set of rules for procuring all healthcare services in England by relevant authorities and is intended to increase flexibility and collaboration in commissioning decisions.
Public Contract Regulations 2015 (PCR 2015)	For contracts awarded, framework agreements concluded, call-offs of framework agreements concluded, or dynamic markets established or procurement that commenced before 24 February 2025.
Scheme of Delegation (SoD)	This sets out clearly who has authority/responsibility to make decisions within the Trust
SME	Small and Medium sized enterprises. PA23 definition- fewer than 250 staff and less than or equal to £44m in annual turnover or a balance sheet total of less than or equal to £38m.
Social Value	The term used to describe the additional benefit created in the delivery of a service contract, which has a wider community, or public benefit.
Southern Alliance	Means Southern Ambulance Services Collaboration of five Ambulance services. Through collaborative procurements the Trusts aim to support each other more effectively, share best practice, and work together to provide high quality resilient care at the best value.
Standing Financial Instructions	The Standing Financial Instructions (SFI's) explain the financial

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	responsibilities to be observed by the Trust Board and all Trust employees
Sustainability	Sustainability in Procurement is whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and the economy, whilst minimising damage to the environment'.
Threshold	Means the financial threshold above which a regulated procurement is required to be undertaken.
Value for Money	A prime aim of the procurement process is to ensure that best Value for Money (VFM) is achieved. Best Value is a combination of Cost, and Quality factors. Quality factors must include 10% Social Value benefits. Costs will include lifecycle costs, not just buying price.
VCSEs	Voluntary, Community and Social Enterprises.
Whole Life Costing	Whole life costing refers to the systematic consideration of all relevant costs and revenues associated with the buying and ownership of a product or service. It considers the total costs incurred over the lifetime of a product, work, or service, including acquisition, operation, maintenance, support, and disposal.