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HOW TO...

Tackle a Social Value response in a private sector tender

A GUIDE FROM
THE APMP UK
SOCIAL VALUE
GROUP



Table 1
Version control

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Contents

Context and Purpose	3
Before the buying begins	4
Pre-tender market engagement	5
Analysing tender questions	6
Responding to tender questions	7
Delivering on your commitments	8

Context

This ‘How To’ guide is a broad introduction to responding to a social value question in a Request for Proposal (RFP) or Invitation to Tender (ITT) from a private sector, or corporate organisation.

Whereas public sector procurement is subject to strict legislative requirements and is often centralised, in the private sector, companies’ procurement processes can vary considerably.

Companies are not only beholden to shareholders (especially companies that are listed on stock exchanges) or private owners, increasingly they are required to report to regulators on non-financial metrics such as sustainability and climate change related measures such as TCFD[1]. Depending on industry or sector, there are additional regulations to consider, for example in utilities or financial services. Social value in the UK private sector should therefore be viewed in this context.

We are seeing more and more of social value in private sector tenders as a result of companies choosing to do so, rather than being required to as they are in the UK public sector. In some sectors, associated themes such as climate change have been included in tenders for well over a decade. As a result, the questions in tenders and evaluation weightings (if provided) are more likely to be linked to the company’s sustainability policies than to mandatory guidelines such as those in the Public Services (Social Value) Act 2012[2].

The social value trends we’ve seen in private sector tenders are:

- Following the public sector requirements closely, including a similar evaluation weighting of around 10% for social value in their tenders. While there is no legal mandate for social value weighting in the private sector, companies are increasingly incorporating social value considerations in their own procurement processes.
- Adopting commonly used measurement frameworks
- Including sector-specific or company-specific requirements for social value alongside other themes such as climate change or power consumption for example, with bespoke evaluation weightings and measurement frameworks.

Having a clear bid strategy around social value can make the difference between winning and losing, so every bid professional needs to understand it.

Purpose of the guide

In this guide, we will share bid best practice and experience from the APMP UK Social Value Group to help you tackle a social value question in the private sector.

We suggest you treat this guide like a checklist to improve your chances of winning. We have split it into sections that map the stages of a Buying Cycle.

[1] The Taskforce for Climate-related Financial Disclosure, a framework for companies to publish information about how climate change affects their business.

[2] The Act requires public sector Buyers in England and Wales to consider how what is being procured will improve the economic, social and environmental wellbeing of the relevant area. There is alternative and complementary legislation in Scotland, Wales and Northern Ireland.

Before the buying begins

There are several things you can and should do as soon as you realise that social value is important to your business:

Check your employer or client has a social value strategy and C-level commitment to embrace social value.

- First, make sure that you, your social value champion and your colleagues understand the difference between social value and ESG/CSR: social value is contract-specific (content and timeline), whereas ESG/CSR are corporate, global initiatives which may not be fully relevant to the contract you are trying to win
- Your company is likely to have Sustainability, Environment, Social & Governance (ESG) policies or even Corporate Social Responsibility (CSR) initiatives. This is a good place to start, but merely quoting an ESG or Sustainability Policy as evidence of your social value commitment won't work as they won't be specific enough. More on that later in this guide
- If you are struggling to know where to start, post a note on our [LinkedIn Group](#) – we can signpost you to various consultancy and training companies that offer support.

Familiarise yourself and your company colleagues^[3] with commonly used frameworks, models and tools as described in our guide:

- "How to Approach Social Value Measurement" available in the APMP Community Area (login details required).

Identify all corporate initiatives, programmes and policies that relate to Social Value topics and have these at your fingertips.

While social value in procurement will typically be over and above existing activities, you can use what you do know as evidence to illustrate how you will deliver contract-specific social value.

Make sure the salespeople in your company or your client have basic Social Value awareness training.

Then they can hold an intelligent Social Value conversation and ask pertinent questions during Capture. This is particularly relevant where the company's Sustainability or ESG Policy does not explicitly mention social value (generally true for multinationals) so colleagues need to understand the overlap and differences.

^[3] There are many functions in your company that will need to be involved. For example, legal, delivery and commercial. Read [our blog](#) for more information:

Pre-tender market engagement

Social Value guidance encourages buying organisations to work out a relevant and proportionate Social Value 'ask' early in the buying lifecycle. This doesn't always happen, but here's how you can help.

1

During the Capture phase of every opportunity (before you receive an RFP or ITT) use every opportunity to engage with Buyers and encourage them to consider how social value fits (make sure to know what your organisation could offer locally from a social value perspective, before engaging with the buyers).

The best practice principles of Capture Management apply here.

- For example, you can use pre-tender market engagement events, one-to-one meetings, Expressions of Interest and supplier briefing days to raise the subject – by helping to shape social value requirements at this early stage, you can get on the Buyer's radar and make sure the RFP or ITT suits you
- Understand that for the companies buying your goods or services, social value is not an afterthought or tick-box exercise but may be integral to their delivery expectations.

2

Align with marketing departments to raise awareness of your social value strategy and company commitment so Buyers see you in a good light. Companies listed on stock exchanges will already be using Annual Reports and other investor relations activities to highlight their contribution to sustainability, but the social value angle may need additional focus. Include charitable elements such as a foundation, local social value commitments or similar.

Analysing tender questions

When the RfP or ITT arrives, you will find at least one question about Social Value.

1. If there is an opportunity to ask clarification questions (CQs), use the process to ask questions about the RFP social value requirements so that you can clearly demonstrate what your company can offer.

2. Analyse the question(s) exactly the same way as any question – deconstruct it into its various parts then make sure you understand every element.
If not, ask CQs

4. Check to see if your commitments will become part of the contract – if this is unclear, ask a CQ.

3. Check the evaluation where provided – how much the question is worth and how it will be scored. We have seen marking schemes that give a mark for the whole answer and schemes that give marks at a granular level. If it's not clear, or if there is no evaluation, ask a CQ.

5. Consider if the Buyer appears to have really thought about the Social Value 'ask' (is it relevant and proportionate to the contract) or have they simply bolted on Social Value at the end. This may help you qualify how much investment to make in responding (bid effort and/or delivery commitments) – we say 'may' because this will be a judgement call based on your knowledge of the Buyer.

6. If the question(s) seem irrelevant and/or disproportionate, push back with a CQ.

8. Always check if character counts include or exclude spaces. Also check if you can include graphics and tables, and whether they are included in the character or word limits.

7. Assess any space limits (word, page or character counts) to be sure they are reasonable for the question. If your Buyer has thought about their social value needs, you may be asked a relevant and proportionate question with enough space to reply. You always have the option to request more space, but remember all suppliers are in the same boat.

9. When you get CQ responses, they will either help you or simply confirm the Buyer's original position.

10. Having finished the analysis and clarification, you will know where you stand and be ready to start planning the response(s).

Responding to tender questions

A high-scoring social value response will comply with the RFP or ITT instructions and meet the top score evaluation criteria, so keep these in mind as you go through the following steps:

1

Align your answer to what's important to the Buyer. Check with the sales team for information gathered during the Capture phase. Check what Sustainability Policies, Statements or social value areas there are on the Buyer's website. Read social value documents included in the Buyer's tender documents

2

Get your social value strategy and story straight – before you even start to do a plan content. Your strategy and story will depend on what your company is prepared to commit to but think 1.creatively and laterally. For example, consider using local Small and Medium Enterprises (SMEs) and Voluntary, Community and Social Enterprises (VCSEs) as delivery partners

3

Work out **what** commitments you will make on this contract, **how**, **when**, **where** and **who** will deliver them, and how you will **measure** and **report** on the impact. You can also use a SMART[4] action plan for clarity purposes as part of your response

4

Always take the time to plan your answer. Make sure you have a section for every part of the answer and balance your character or word count across the different parts in accordance with any weighting. If you have a page count, do a mock-up to visualise how much space you can give each part.

5

Write your response so it's clear, concise, **specific to the contract** and committed.

6

Follow your company's or APMP's best practices for reviewing and approving your response.

[4] Specific, Measurable, Achievable, Realistic, Timely.

Delivering on your commitments

To deliver social value on the ground, your commitments should become part of your contract. Remember that you will probably need the Buyer to play a part in your success.

Consider the following:

1

Appoint an accountable owner to plan and execute your commitments.

2

Develop a Social Value Delivery Plan with clear roles and responsibilities, metrics, reporting and continuous improvement, based on the SMART plan you used in your RFP response (if used).
Be aware of any penalties for non-delivery of social value commitments

3

Stay on track

4

Shout about your successes.



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