



# Framework for Defining Social Value

A framework for defining and delivering social value on built environment projects

February 2021

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With thanks to our Social Value Programme Partners:



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## Social Value Programme Partners



## Task Group Industry Supporters



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# Introduction |

Since the introduction of the 2012 Public Services (Social Value) Act in the UK, there has been significant focus on how we measure social value. Although this is an important practice for the industry to develop, it is only one piece of the puzzle.

With our communities in ever more need of support, our primary focus, as a sector, should be on how we create social value.

One of the biggest challenges for industry practitioners in creating social value on their projects is being able to understand what social value means for that project and what best practice delivery looks like.

## People, place and quality of life

The concept of social value has captured the imagination of built environment practitioners because it speaks to something quite fundamental about the intersection of people and place, and how our role within that relationship can influence quality of life. We know that the built environment has the power to shape our lives in profound ways, and this framework is designed to help us understand and positively influence that.

## The framework approach and rationale

From our activities under the Social Value Programme, UKGBC identified a need from the built environment sector to establish a definition of social value that focussed on the impact that buildings, infrastructure and places have on people. What follows is a framework which provides guidance on defining social value for any built environment project. This is because a single definition of social value could not be relevant for the range of asset types and communities and stages of the asset lifecycle. This guidance sits alongside, rather than conflicts with, existing definitions of social value. The second part of the framework is a set of principles and guidance on the process for delivering social value at any stage of the asset lifecycle. The ambition is for this document to provide a common language for practitioners and set out a certain standard of delivering social value in the built environment context.

# How to use the framework |

## Scope of application and relevance

This framework has been designed to be applicable to new and existing buildings, built places and infrastructure. It has been designed to be relevant and useful for practitioners at any stage of the asset lifecycle. While efforts have been made to make this framework relevant to all project and portfolio sizes, it is likely that aligning a project with this framework will be more achievable for larger projects. As much of the framework owes its character to the Social Value Act, its use will be most relevant to organisations and practitioners operating in the UK.

## How to use the framework

The primary use for this framework is to help define social value for a built environment project. Below we have outlined some of the scenarios where the definition might be used:

### PROJECT TEAMS

To provide a focal point and common language for collaboration between stakeholders, setting a standard of delivery that is established early on and continues throughout the development lifecycle.

### PLANNERS

To help articulate a level of ambition in a Local Plan / planning condition.

### PROCUREMENT TEAMS

To help articulate a level of ambition in the procurement process.

### DEVELOPERS

To articulate the level of ambition of a project and appraise development options.

### INVESTORS

To help articulate a level of ambition within investment criteria.

### COMMUNITIES

To understand the opportunities for participation and hold partners to account throughout the development process.

## Future work

With this framework, we are hoping to further efforts to build a professional discipline around social value for the built environment sector. UKGBC will continue to work collaboratively with the industry to refine the framework and support organisations wishing to use it.

# Defining social value |

As what constitutes social value depends on the best interests or needs of a group of people, it can look very different in different contexts. That is why there are numerous definitions of social value for different scenarios. This section begins by presenting a high-level definition of social value for the built environment which illustrates the potential scope of social value for any built environment project. It then sets out a process for defining social value that is relevant across any asset type or stage of the asset lifecycle.

## Understanding social value

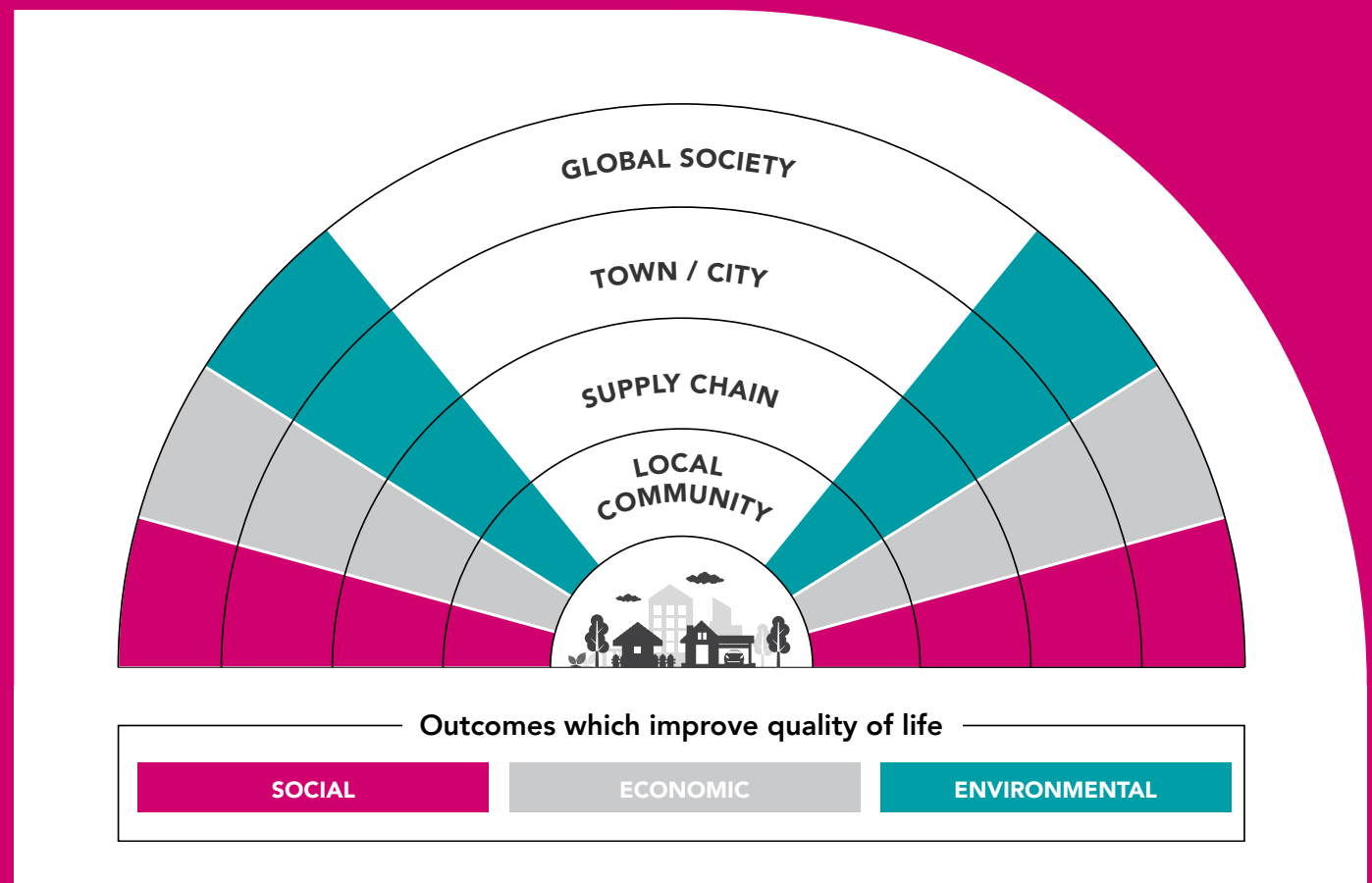
Social value encompasses environmental, economic and social wellbeing and understands each of these in terms of their impact on the quality of life of people. What outcomes improve quality of life, and how to deliver them, will look very different depending on the context. The most important contextual factor is who

will be affected and what their needs are. Often, deciding who those people are is done by drawing a line around a particular "relevant area" or location. Social value is therefore holistic in scope but focussed on people, highly dependent on context and inherently local to a particular area.

### Definition of social value for the built environment

In the context of the built environment, social value is created when buildings, places and infrastructure support environmental, economic and social wellbeing, and in doing so improve the quality of life of people.

Exactly which environmental, economic and social outcomes create social value will depend on the best interests of the people most impacted by the project or built asset. Those outcomes must be defined for each built environment project.



### Defining social value for any project or place

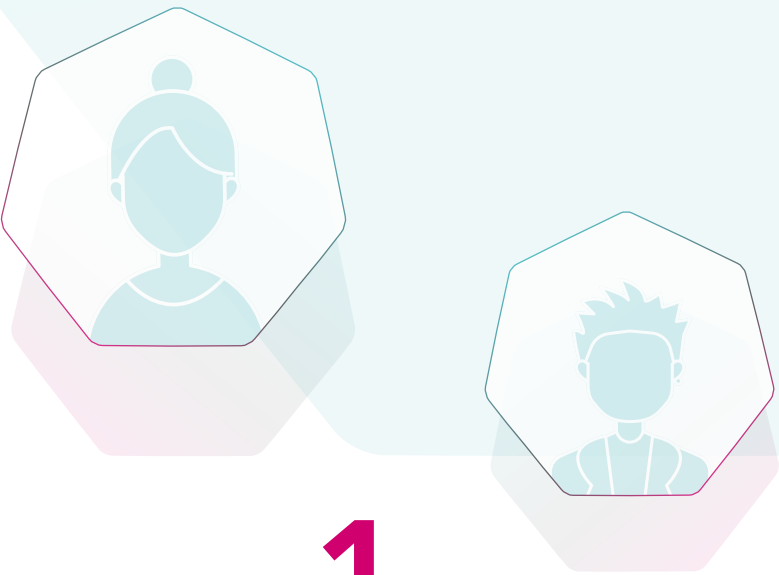
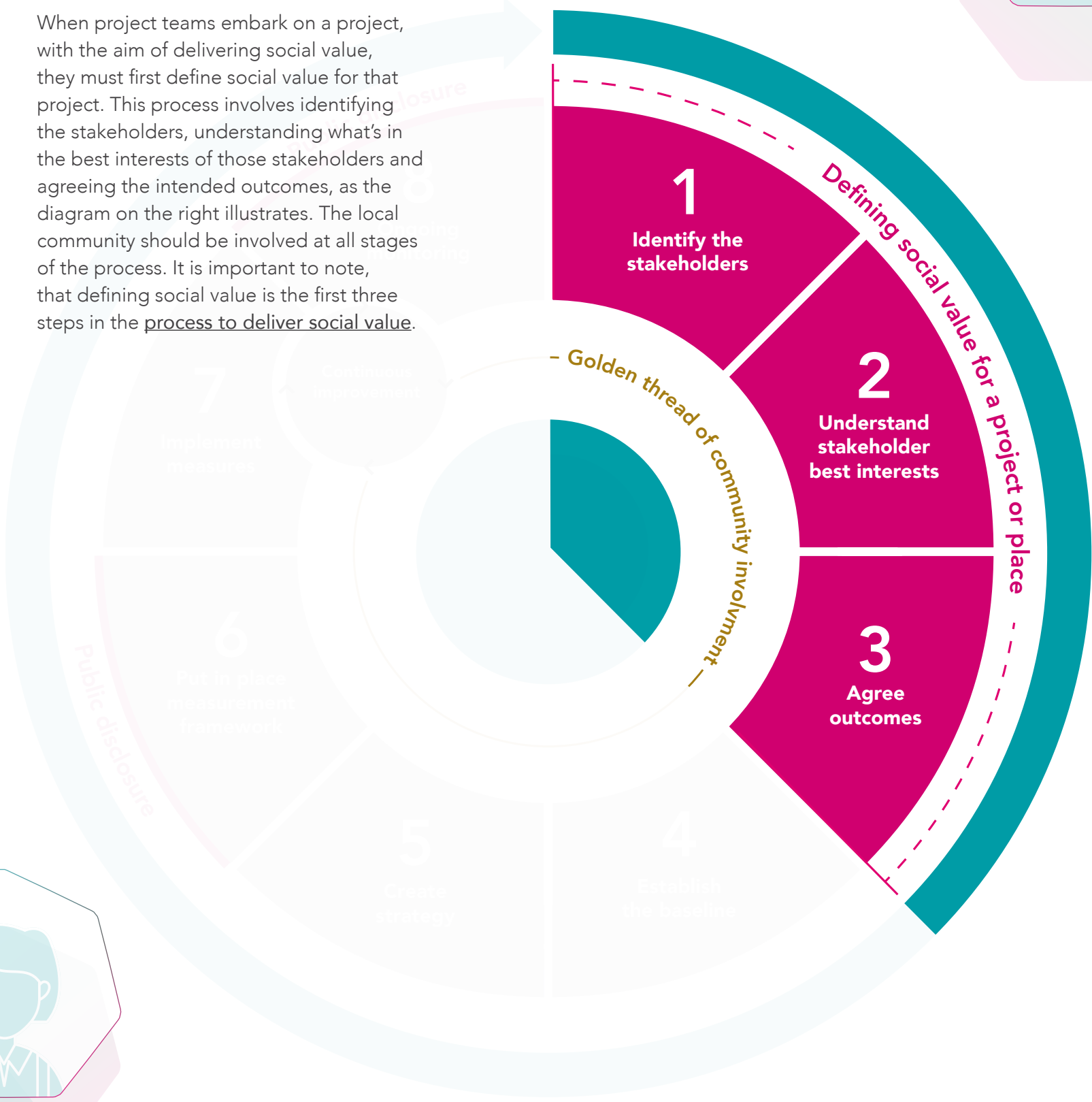
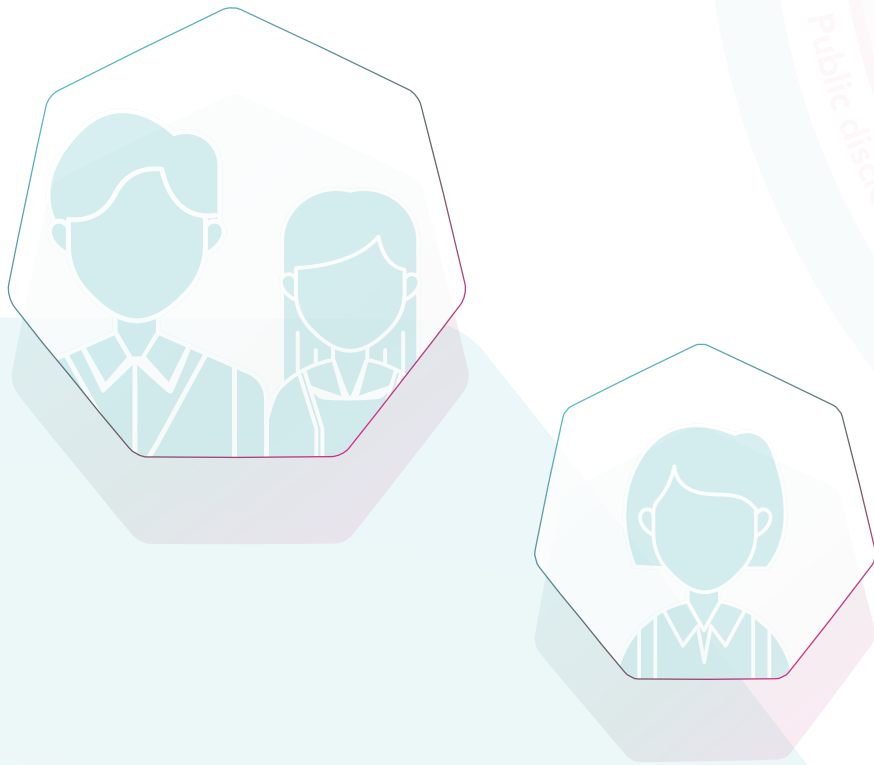
The definition of social value for a project or place should include an identified group of people impacted by that project or built asset and a set of agreed outcomes which would improve their quality of life, thereby creating social value.

# Process for defining social value

## How to create a definition of social value for a project or place

Social value is notoriously difficult to define for built environment projects. This is because for every project there is a different group of people with different interests and needs. One location or community could gain social value from improved social networks, another from big green open spaces, a third from employment opportunities and a final one could gain social value from all three. Although the interventions and outcomes might be different, the ultimate goal is the improvement of quality of life.

When project teams embark on a project, with the aim of delivering social value, they must first define social value for that project. This process involves identifying the stakeholders, understanding what's in the best interests of those stakeholders and agreeing the intended outcomes, as the diagram on the right illustrates. The local community should be involved at all stages of the process. It is important to note, that defining social value is the first three steps in the process to deliver social value.



1

**Identify the relevant people based on the likely impact of the project on their quality of life**

2

**Understand what's in the best interests of the relevant stakeholders**

3

**Agree a bespoke set of social value outcomes for the project based on the best interests of the relevant stakeholders**

# 1. Identify the stakeholders

## Identify the relevant stakeholders for a project

The primary beneficiaries of social value should be those most impacted by an action or intervention. In the context of the built environment this typically means the people local to a building, infrastructure asset or place and the people in the associated supply chains. But, depending on the asset type, the whole population of the city or town may need to be considered, or even wider stakeholder groups.

For example, large infrastructure projects can cross local authority or even national boundaries. Although the focus is still on a particular location, the associated supply chains can stretch the physical distance between places and the people they impact. Delivery partners and local authority stakeholders should be understood as “co-beneficiaries” as they should also benefit from the delivery of social value, but they are not the intended beneficiary.

### Identifying the local community stakeholders

The local community should be defined as the people who are most impacted by a building, infrastructure asset or place. In most instances this will be the people who most frequently interact with that building or place. In many instances, there will naturally be a geographical boundary for a particular community but these shouldn't be relied on arbitrarily. In many local authority contracts, the local stakeholders are defined by the local authority ward or area. In these instances, delivery partners should push

for a more sophisticated approach. The local community should include any future stakeholders (and possibly even future generations) but the focus should be on existing stakeholders. The people defined as local to a building or place will include residents, local business owners, workers and visitors, and will be changing all the time. The local community is likely to include many sub-groups, potentially with competing priorities and needs.



### Process for identifying local and supply chain stakeholders

1. Consult Appendix 4: Stakeholders by lifecycle stage and asset type
  2. Gather evidence of stakeholders impacted by similar projects
  3. Consult relevant local authority documentation (such as Area Action Plans)
  4. Engage with visible community stakeholders and groups (e.g. resident associations; local service providers; community and faith groups; local charities)
  5. Consult with people interacting with the building or place or across a specific geography
  6. Consult the building use data of existing buildings
- Throughout these steps, it will be important to investigate whether the stakeholders are impacted by the project or place and therefore whether they are in scope.

### Identifying the supply chain stakeholders

The supply chain stakeholders include the people working in the supply chains associated with a building or place and the communities impacted by the operations of those supply chains. For example, if a product to be used on a project is manufactured in a factory, the supply chain stakeholders should include both the factory workers and the residents living local to the factory. It is likely that exactly who the supply chain stakeholders are will be decided after the social value outcomes are agreed. This allows for the outcomes, and wider responsible sourcing criteria, to be incorporated in the rating and selection process of supply chain partners.

### Acknowledging wider stakeholder groups

The agreed outcomes should also reflect the best interests of wider stakeholder groups. These wider groups include the town, city or wider area stakeholders and global society as a whole. Considering the impact the project might have on the wider stakeholder groups will help determine whether they are in scope. It is important to note that, in most instances, these groups do not require further analysis to understand who they consist of, nor which of those constituent stakeholders are more impacted by the project or built asset. They should be considered as a whole.



## 2. Understand stakeholder best interests

### — Understand what’s in the best interests of the relevant stakeholders

#### Local community

There are lots of different methods for understanding what’s in the best interests of the local community, some of which are articulated in this section. For all methods, the most important aspect is the involvement of the local community in the process.

Social	Economic	Environmental
Community networks	Employment	Sustainable transport options
Community engagement	Skills	Green spaces
Local identity	Small businesses	Air quality
Diversity of building uses	Affordable housing	Resource use and waste
Security and safety	Physical resilience	Biodiversity & urban greenery
Public spaces	Accessibility	Warm, damp-free housing

Figure 1. Outcomes associated with a project or place which impact the quality of life of people.



#### Local needs analysis

A local needs analysis could involve an assessment of the existing environmental, economic and social wellbeing of a particular area or an assessment of the wellbeing of individual stakeholders. Any deficiencies in those assessments when compared to national benchmarks will indicate a local need. To decide which aspects of environmental, economic and social wellbeing you want to assess an area against, you can use existing frameworks such as those listed in Figure 2 or the outcomes that we have listed in Figure 1.

Useful holistic frameworks	Useful data sources
UN Sustainable Development Goals	Indices of Multiple Deprivation
OECD Wellbeing Framework	ONS Well-being Data
Local Plans / Local Authority Area Action Plans	

Figure 2. Table of frameworks and data sources for conducting a local needs analysis.

#### Mapping social value

Any built asset is likely to be surrounded by other places and initiatives which provide social value. Mapping out these assets and initiatives with the local community is proving a successful method for understanding what these are, and for engaging the local community in this stage of the process.

#### Place-based assessment

The existing social value of a building, place or piece of infrastructure is the sum of the environmental, economic and social outcomes or wellbeing attributed to that built asset. Understanding the existing social value of a building or place is an important step in proving that the social value delivered is additional. The existing social value is best assessed through engagement with the relevant stakeholders.

#### Supply chain, wider area and global society

Understanding the best interests of the supply chain stakeholders, the city or town as whole and of global society is more theoretical. The relevant Local Plan is the best source of information for understanding the best interests of the town, city or wider area. Understanding the best interests of the supply chain may have to be a speculative exercise based on the required goods and services. However, if the project takes place after the supply chain has been put in place the sustainable procurement strategy will be a valuable source of information. Frameworks such as the UN Sustainable Development Goals are a great source of information about the best interests of global society.

### 3. Agree outcomes

#### — Agree a bespoke set of social value outcomes for the project based on the best interests of the relevant stakeholders

Outcomes are the consequences of any strategy to deliver social value.

Typically, they are organised into environmental, economic and social wellbeing to reflect the holistic nature of social value. Any outcome which has an impact on the quality of life or wellbeing of people qualifies as a “social value outcome”.

Each project should have a bespoke set of social value outcomes which set out the ambition for delivering social value on that project. The chosen outcomes need not comprehensively reflect all potential outcomes. The intended outcomes should be arrived upon and agreed between stakeholders, including the local community, in a collaborative process.

#### Determining what outcomes are material

The best interests of the relevant stakeholders are the key determining factor for deciding which outcomes should be the focus of a social value strategy. The first two steps will have established these interests. Mapping out the potential outcomes and stakeholder groups with the stakeholders may be a useful method for choosing which outcomes should be the focus for a strategy to deliver social value. The relevance of the outcomes to the building, place or piece of infrastructure in question should also be considered.

#### Thinking ahead to the delivery strategy

In practice, it will probably be necessary for the delivery team to think ahead to implementation and consider which interventions will be sustainable and can be supported and maintained in the long-term. This may determine certain outcomes. It will also be important to deliver within existing resource and time constraints and take advantage of activities that the project team are well set up to deliver.

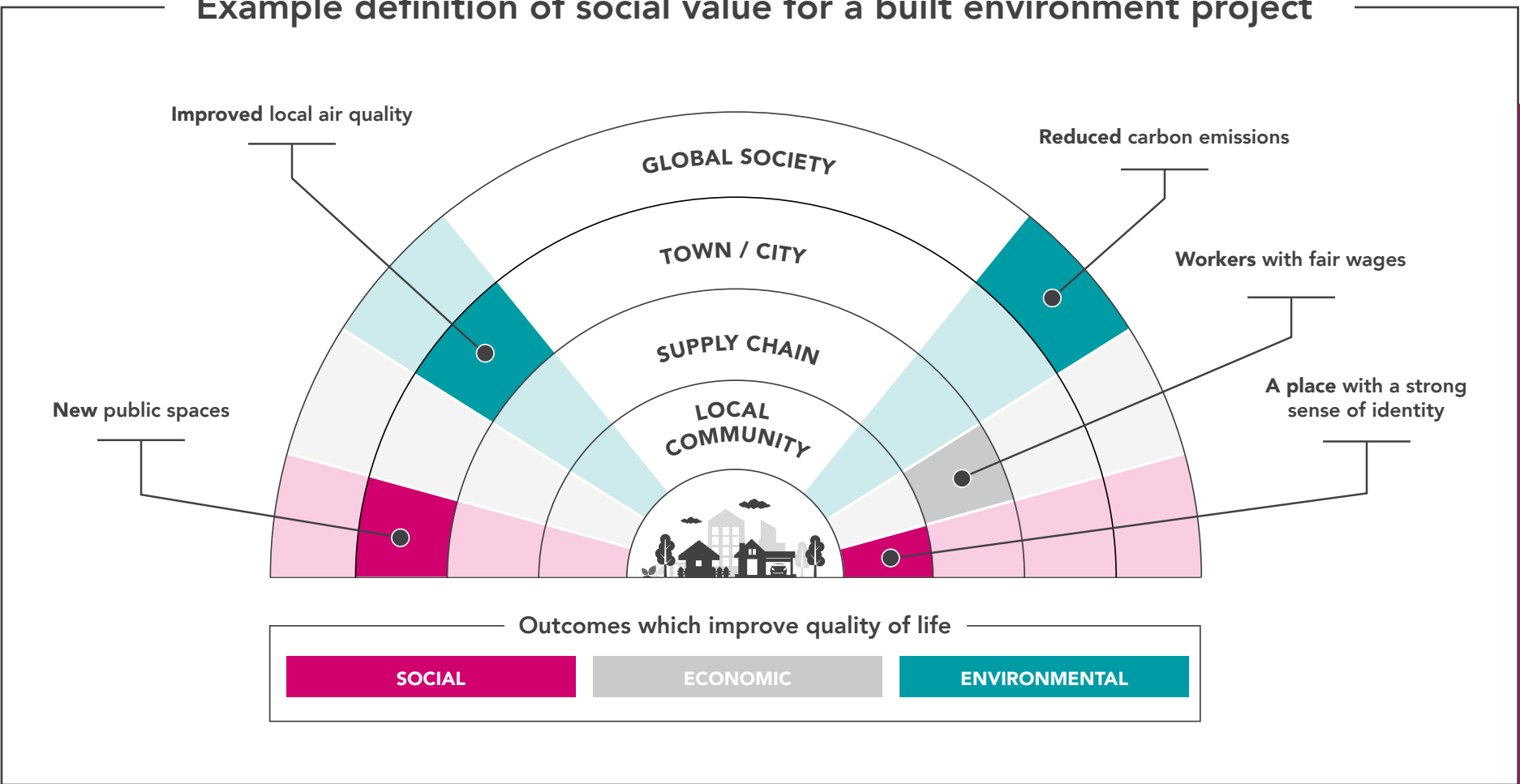
#### Prioritising stakeholders

As the needs of the local community will vary across different sub-groups, it is likely that conflicting needs will need to be prioritised. In most instances, groups most negatively impacted by the project should be the first priority. For most regeneration and residential-led schemes the existing stakeholders should take priority over new stakeholders. From that point, a good general rule is for groups with the greater needs to be prioritised above groups with lesser needs.

#### Weighting outcomes

Some outcomes will be more important than others. Later, when setting out the delivery strategy and measurement framework, it will be possible to set higher targets for certain outcomes. To help inform that project teams may wish to articulate the relative importance of different outcomes at this stage.

#### Example definition of social value for a built environment project





# Delivering social value |

## Principles for delivering social value

From the efforts of practitioners over the past few years, certain best practice principles of delivery have emerged. Principles are helpful as they are consistently relevant across a wide variety of built environment scenarios, at different stages of the asset lifecycle.

### 1. Context

In the context of the built environment, how to deliver social value will depend on the type of asset or place, the stage of the asset lifecycle and, most importantly, the needs of the local community.

### 2. Place

Efforts to deliver social value should primarily focus on the direct impacts that buildings, infrastructure and places have on people but should also include, and be supported by, the operations and activities of organisations who invest in, plan, design, construct, operate and occupy them.

### 3. Outcomes

Measuring the success of a social value strategy should focus on outcomes rather than the interventions or measures that are put in place. The ultimate success of a strategy should be judged by improvements in the quality of life based on the lived experience of people.

### 4. Collaboration

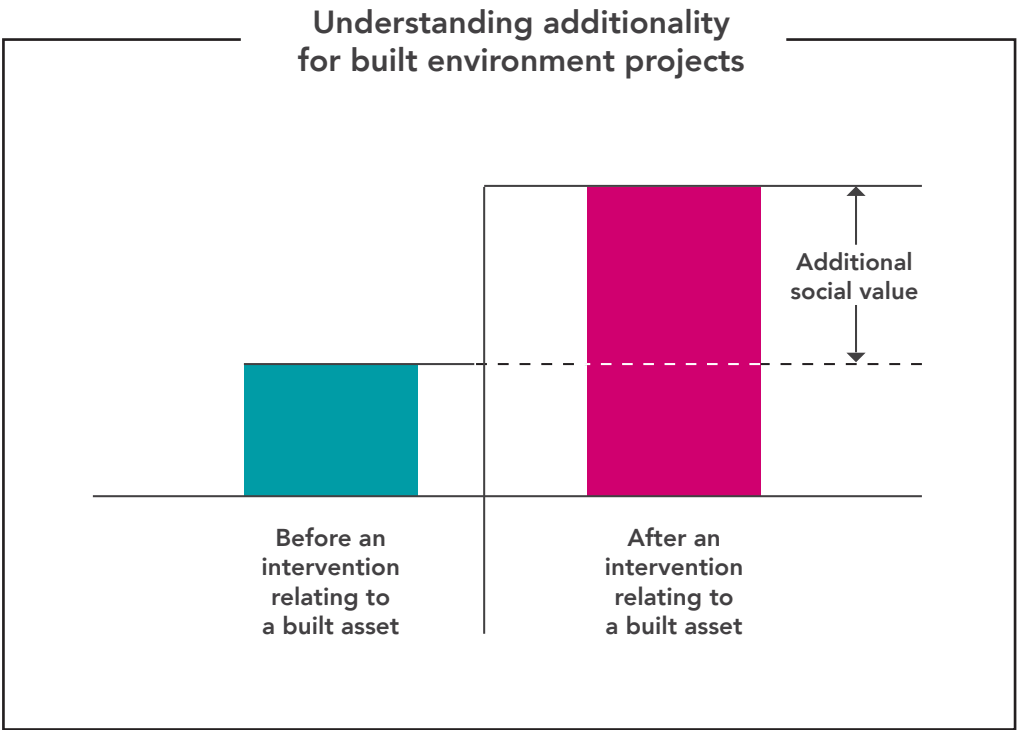
Maximising positive social value outcomes from a project requires genuine collaboration between private, public and third sector stakeholders. It is also essential that the local community are able to meaningfully participate in decision-making.

### 5. Process

Project teams should follow a defined process (outlined on page 18) for defining and delivering social value. This process should iterate across the lifecycle of the building or place so that new stakeholders can pick up on earlier work.

### 6. Additionality

Creating social value should be about providing additional value, over and above that which already exists. In the context of the built environment this means that social value should be understood as the net benefit in quality of life for an identified group of stakeholders from an intervention associated with a building, place or piece of infrastructure. See diagram above.



# Process for delivering social value

The process for delivering social value should start at the conception stage of a project and iterate across the asset lifecycle, allowing each new delivery partner to pick up on earlier work but also take stock of the changing context and factor that in. For example, taking into account any changes in who the local community are and how their needs might have changed. The local authority has a unique opportunity to play a constant role in the changing stakeholder landscape.

The first three steps, identifying the relevant stakeholders, understanding their best interests and agreeing outcomes, help to define social value for a particular project or place. Then, after the strategy has been created, establishing a measurement framework, implementing, monitoring and the continuous feedback loop of improvement are critical to effectively deliver social value. Step four, establishing the baseline social value is essential to demonstrating that the strategy will provide additional value to stakeholders.

Across all of these steps should run a golden thread of community involvement. The more the community is involved in the process the greater the likelihood of creating positive social value. This is both because their contributions are very valuable, but also because involving communities in decision making has a direct impact on wellbeing.

Practitioners wishing to publicly disclose their approach should do so after they have established a strategy and measurement framework and then publicly report on outcomes on an annual basis.



# Appendix 1 |

## Glossary of terms

### Additionality

When an impact arises from an intervention that would not have occurred had the intervention not taken place

### Asset lifecycle

The time from when an asset is first conceptualised all the way to the asset's end of life

### Built asset

A catch-all term for buildings, places and infrastructure

### Built environment

Places and spaces created or modified by people to serve their needs

### Delivery partners

The organisations involved in the delivery of a project or place

### Environmental, economic and social wellbeing

Equivalent to environmental, economic and social capital

### Existing social value

The existing environmental, economic and social wellbeing of a place before a project is initiated

### Infrastructure

Set of physical facilities and systems that support the functionality of society

### Local community

People who regularly interact with or are local to a place

### Materiality

The quality of being relevant or significant

### Outcomes

The consequences of interventions or measures

### Quality of life

The standard of life experienced by an individual or group

### Social value outcomes

Outcomes which improve the quality of life of people

### Stakeholder needs

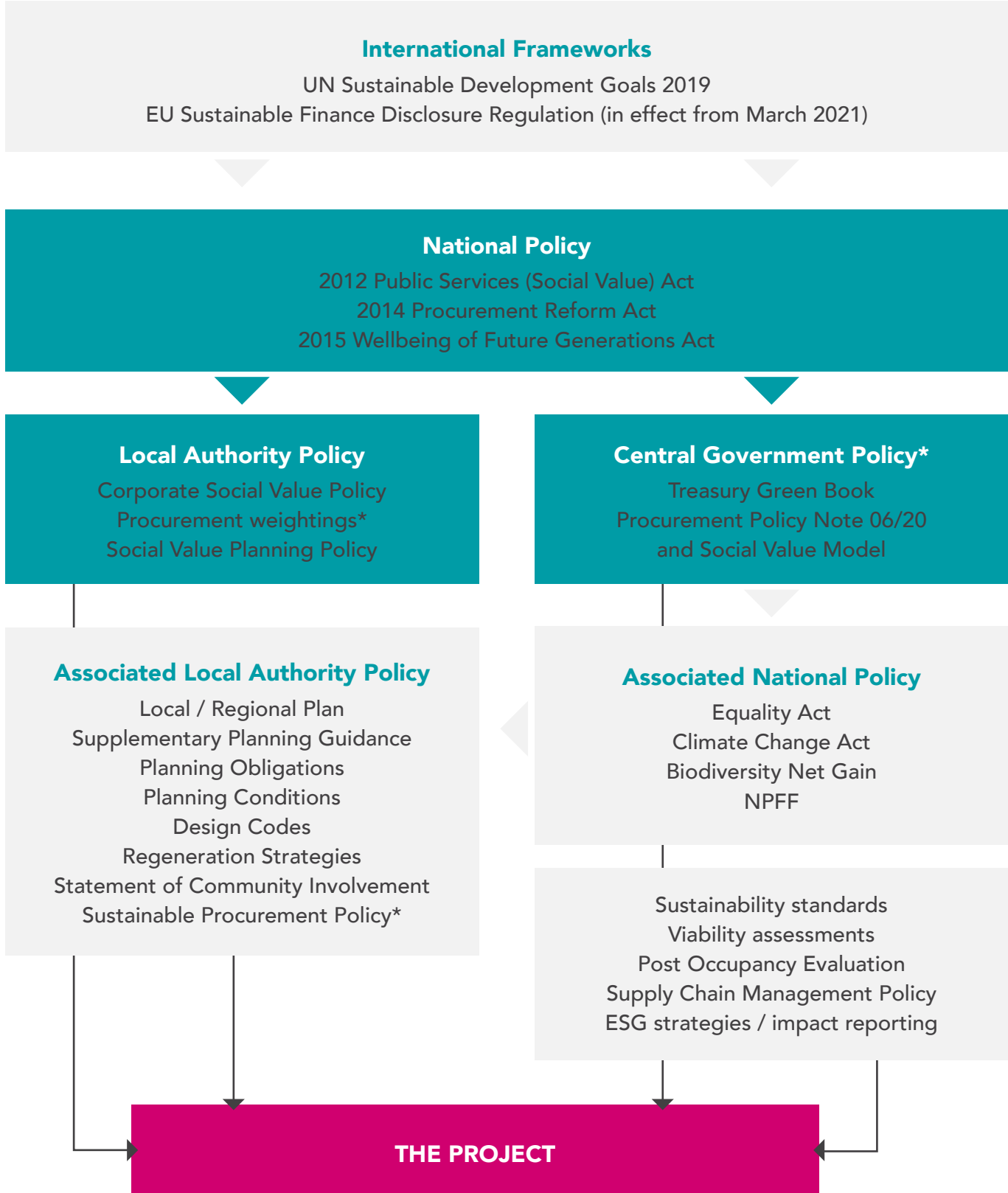
The attributes found to be lacking in existing environmental, economic and social wellbeing of identified stakeholders which could be capitalised on to improve the quality of life

### Supply chain stakeholders

The people working in the organisations connected to a project and the people impacted by the operations of those organisations

# Appendix 2 |

## Social value policy landscape



# Appendix 3

## Existing social value definitions

Source	Definition
<a href="#">British Standards Institute</a>	Social value is created through the generation of personal and collective wellbeing over the short and long term.
<a href="#">Future of London</a>	Additional value created in the delivery of a service contract which has a wider community or public benefit. This extends beyond the social value delivered as part of the primary contract activity.
<a href="#">HACT</a>	HACT advocate identifying community (i.e. social) impacts, in terms of changes to wellbeing of people resulting from investment or interventions and then applying monetary (£) values; where these values follow the HM Treasury Green Book and Magenta Book guidelines and so are consistent with policy evaluation methodology in all other OEDC countries and international organisations like the World Bank and United Nations. This 'social value' is calculated. Users of other Social Value Banks created by Simetrica Jacobs also work to these principles (i.e. 'social value' is calculated by monetising 'social impacts')
<a href="#">Institute of Civil Engineers (ICE)</a>	The additional, wider benefits that can be created by organisations and projects, for individuals, communities and local businesses.
<a href="#">RIBA</a>	Dimensions of social value in the context of the built environment: <ul style="list-style-type: none"><li>• Jobs &amp; apprenticeships</li><li>• Wellbeing generated by design</li><li>• Designing with the community</li><li>• Learning developed through construction</li><li>• Constructing buildings using local materials</li></ul>
<a href="#">Social Enterprise UK</a>	The additional benefit to the community from a commissioning/procurement process over and above the direct purchasing of goods, services and outcomes.
<a href="#">Social Value International</a>	Social value is the quantification of the relative importance that people place on the changes they experience in their lives. Some, but not all of this value is captured in market prices. It is important to consider and measure this social value from the perspective of those affected by an organisation's work.
<a href="#">Social Value UK</a>	Social value is the value that people place on the changes they experience in their lives. Some, but not all of this value is captured in market prices.
<a href="#">Supply chain sustainability school</a>	Social value means the direct, positive impacts for people and communities that can be created by going beyond fit for purpose built environment design and creating socially sensitive infrastructure or architecture.
<a href="#">Sustainable NI (Social Value Toolkit)</a>	Social Value is a process whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis. It does this by generating benefits not only to the organisation, but also to society and the economy, whilst minimising damage to the environment.
<a href="#">Sustainable Procurement Task Force</a>	A process 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.
<a href="#">The Social Value Portal</a>	Increasingly, organisations are considering their activities holistically, taking account of the wider economic, social and environmental effects of their actions. Social Value serves as an umbrella term for these broader effects, and organisations which make a conscious effort to ensure that these effects are positive can be seen as adding social value by contributing to the long-term wellbeing and resilience of individuals, communities and society in general.

Source	Definition
<a href="#">Association of Greater Manchester Authorities (AGMA)</a>	A process whereby organisations meet their needs for good, 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 economy, whilst minimising damage to the environment.
<a href="#">Bath and North Somerset Council</a>	In this policy the term "social value" refers to outcomes that will provide benefit to the residents of the Council area – either directly and individually or through businesses and community organisations – particularly where these benefits are linked to the other elements in the contract but have not conventionally been specified as a part of the contract requirements or evaluated as part of the procurement process.
<a href="#">Brighton and Hove City Council</a>	Social Value is about securing maximum impact on local priorities from all public investment. The city will maximise social value by focusing particularly on strengthening communities through collaborative working across the public, private and community and voluntary sectors.
<a href="#">Bristol City Council</a>	A process whereby organisations meet their needs for good, 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 economy, whilst minimising damage to the environment.
<a href="#">Croydon Council</a>	Social Value as a process where we as a local authority can meet the needs of our communities when procuring goods, works and services, in a way that ensures we are achieving value for money on a whole life costs basis.
<a href="#">Cumbria County Council</a>	A process 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.
<a href="#">Lancashire City Council</a>	Social Value is the additional economic, social and environmental benefits that can be created when LCC purchases a service from an outside organisation, above and beyond the value of the goods or services.
<a href="#">Salford</a>	Social Value asks the question: "If £1 is spent on the delivery of services, can that same £1 be used to also produce a wider benefit to the community?". This involves looking beyond the price of each individual contract and instead looking at the collective benefit to a community.
<a href="#">Shropshire City Council</a>	Social value involves consideration of how resources are allocated and used beyond the value of a contract. Social value involves thinking about how each contract can generate wider benefit to the community.
<a href="#">Tower Hamlets Council</a>	Social Value refers to the extra social, economic and environmental benefits that can be secured throughout the commissioning and procurement cycle. Within the tender evaluation, one way of interpreting social value could be as an extension of the 'quality' aspect of the evaluation. The aim of the council is to maximise the social value obtained for every pound spent, whilst continuing to uphold the principle of value for money.
<a href="#">West Midlands Local Authority</a>	Social value requires commissioners to think about how they achieve outcomes in a more integrated way at the pre-procurement stage. Rather than thinking about services in isolation or in the short term, this approach requires commissioners to consider long term costs, sustainability and how inclusion of additional social value outcomes can potentially reduce pressures in other areas and provide capacity and funding for improved community benefits.

# Appendix 4 |

## Stakeholders by lifecycle stage and asset type

Stakeholders by lifecycle stage			
Lifecycle stage	Local community	Supply chain	Delivery partners
Conception / investment	Existing residents Existing businesses		Investor Developer Landowner
Planning	Existing residents Existing businesses Regular visitors Local third sector organisations		Developer Planning authority Planning applicant
Design	Existing residents Existing businesses Regular visitors		Developer Architects Design team
Construction	Existing residents Existing businesses Regular visitors	Sub-contractors Product manufacturers Third sector partners	Developer Contractor
Operation	Residents Employees Regular visitors	Service providers Suppliers Maintenance Third sector partners	Investor Property managers Occupiers

Operational stakeholders by asset type			
Asset type	Local community	Supply chain	Delivery team
Residential	New homeowners New tenants Nearby / existing residents	Communal service providers	Developer Landlords
Offices	Employees	Office suppliers Maintenance Caterers	Landlords Occupiers Property managers
Industrial	Employees Nearby residents	Product suppliers Caterers	Property managers
Retail	Employees Shoppers	Goods suppliers	Landlords Occupiers Property managers
Operation	Users	Utilities providers	Operators

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