A Guide for Delivering Social Value on Built Environment Projects

March 2022

Contents |

Foreword |

Just over a year ago UKGBC published the Framework for Defining Social Value, which was produced to plug an industry gap. While there was lots of good practice, what was lacking was a common language for practitioners, and a logical – and shared - process for delivering social value on built environment projects. Since then, it has gathered more traction than we could ever have predicted or hoped for. There's now continued momentum in the sector and a deeper understanding of the application of social value across industry. This is evidenced by the volume of new guidance that has been published recently, focussing on topics like embedding social value right through procurement, planning and design.

UKGBC have spent the last year working closely with our Social Value Partners to test the UKGBC process for delivering social value in the real world on live projects, and develop a new delivery guide. This new guide translates the progress and learning from the industry into a straightforward set of guidance that will help project teams cut through the noise to deliver social value across the project lifecycle.

We hope that practitioners from across the built environment will find this guide useful and use it to inform their social value delivery approach in the future.

Simon McWhirter
Director of Communications, Policy & Places

Introduction |

In the context of the built environment, social value is created when buildings, places and infrastructure support and enhance environmental, economic and social wellbeing – through this improving residents' quality of life. Exactly which environmental, economic and social outcomes create social value will depend on the interests of the people most impacted by the project. Those outcomes must be defined for each built environment project.

In the last couple of years a significant amount of social value guidance has been published for the built environment sector. This includes guidance on social value measurement and embedding social value into procurement[1], planning[2] and design[3]. UKGBC's Social Value Programme has found that translating this guidance into a form that best supports project delivery is one of the biggest challenges facing built environment project teams.

This guide was developed to respond to this challenge and enable project teams to deliver social value across the project lifecycle. It includes:

1 Delivery checklists for senior decision-makers to use when leading built environment projects

2 Detailed guidance notes aimed at practitioners who are responsible for day-to-day project delivery

3 Best practice case studies

Over the last year, UKGBC Social Value Partners have tested the process for delivering social value on a range of live building projects. Throughout the testing exercise Partners provided UKGBC with valuable feedback. This has resulted in some changes to the process for delivering social value (Figure 1) and the development of the delivery checklists and guidance notes within this guide. The case study projects can be found here.

This guide follows the 8 steps of the UKGBC process for delivering social value with each delivery checklist and guidance note relating to a step of the process. We hope this guide helps project teams to unlock social value on built environment projects.

This guide builds on and supports other outputs from UKGBC's Social Value Programme

[1] Social-Value-Model-Edn-1.1-3-Dec-20.pdf (publishing.service.gov.uk)
[2] Embedding-Social-Value-into-Planning_Briefing-Paper_August-2021.pdf (socialvalueportal.com)
[3] https://socialvalueportal.com/wp-content/uploads/2021/11/MaximisingSocialValueInDesign_3.pdf

The process for delivering social value

Delivering social value is an 8-step process that can be applied to any built environment project, at any stage of the project lifecycle. However, a project will have greater impact if social value is embedded from project inception.

The process has been revised in response to feedback from UKGBC Social Value Partners and members.

Figure 1:
UKGBC process for delivering social value
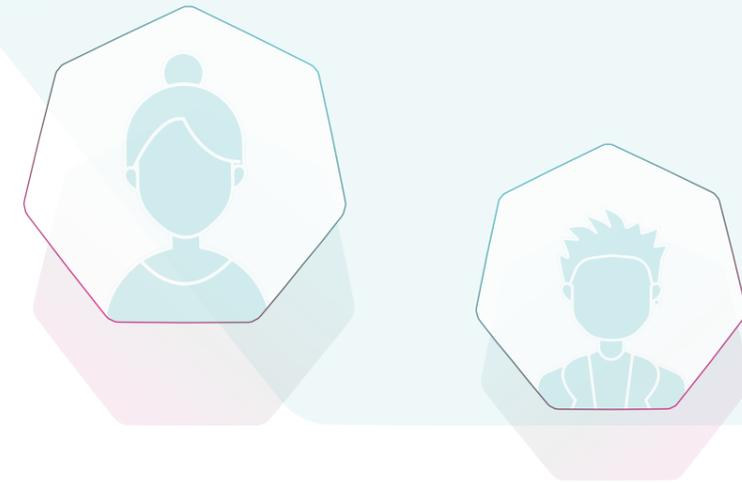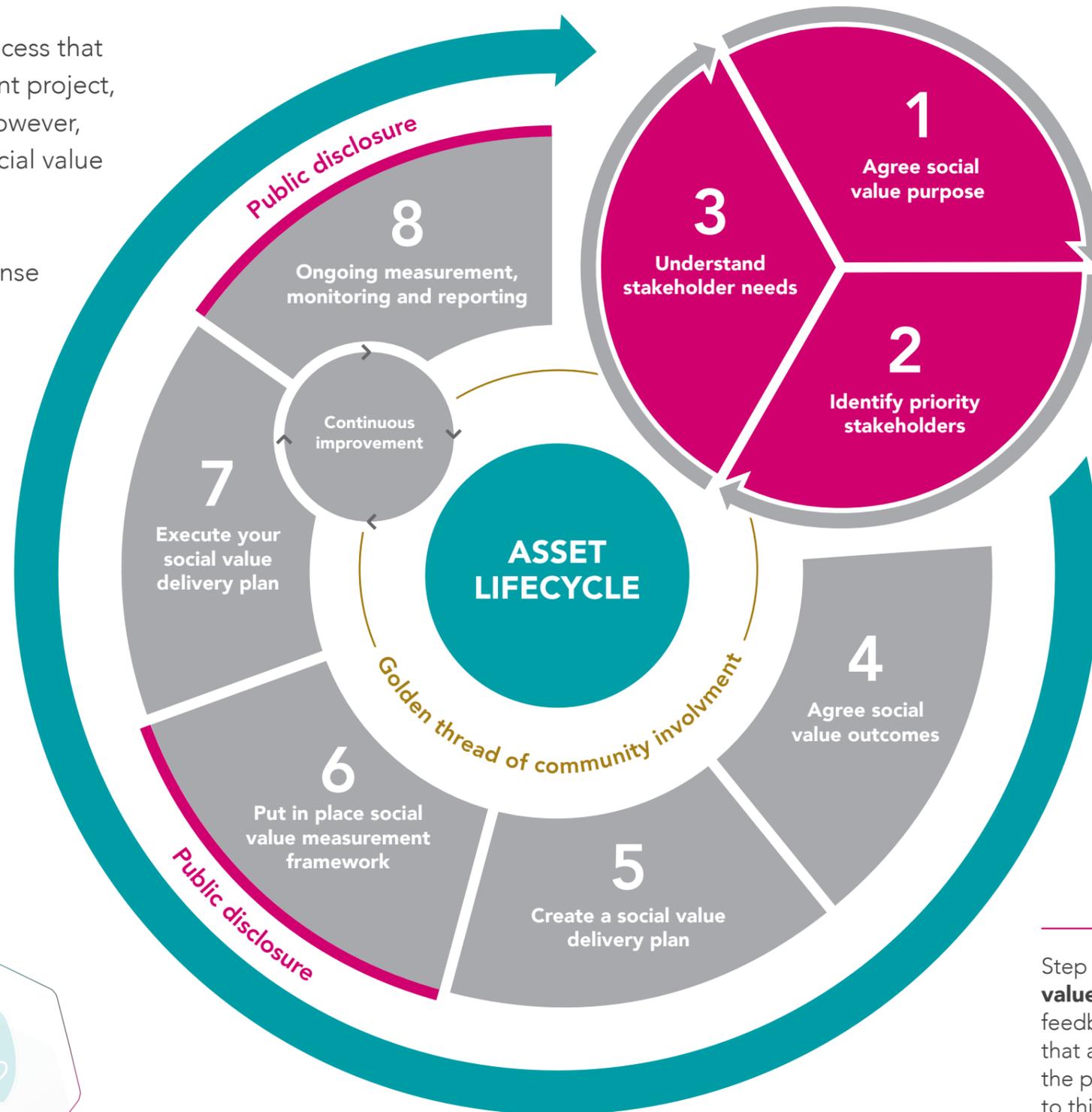
Key revisions include:

Agree social value purpose has been included as an additional first step. This responded to feedback regarding the importance of identifying a project's social value "opportunity" and working towards a shared goal.

Steps 1, 2 and 3 are now presented as part of an iterative process. This was in response to feedback from UKGBC Social Partners who described revisiting each step multiple times before agreeing a final list of social value outcomes during project testing.

Step 4 Establish the baseline has been removed. This responded to feedback from UKGBC members who felt that baselining was not possible before a social value measurement framework was in place.

Step 5 has been renamed **Create a social value delivery plan.** This responded to feedback from UKGBC members who felt that a 'social value strategy' may fail to capture the practical delivery elements which are key to this step.

How to use the guide |

Scope of application and relevance

This guide has been developed to support practitioners deliver social value on built environment projects. However, some of the principles will also support the development of corporate/portfolio scale social value approaches. It is relevant to practitioners from any professional discipline in the built environment.

How to use the guide

This guide is split into three sections:

1. DELIVERY CHECKLISTS

Every step of the process for delivering social value has a delivery checklist. Each delivery checklist includes:

- A summary of what that step means
- A description of why that step is important
- A task checklist

The delivery checklists are for senior decision-makers who lead built environment projects.

2. GUIDANCE NOTES

Each step also has a guidance note[4]. Each guidance note includes:

- Practical task-by-task guidance to support practitioners deliver each step of the process
- Useful information, common mistakes and examples
- A link back to the relevant delivery checklist

Guidance notes are aimed at practitioners who are responsible for the deeper level of detail required for social value in day-to-day project delivery.

3. CASE STUDIES

Case studies are linked throughout the guide. Each case study includes:

- A project overview
- Further information on the project's social value delivery approach

This guide has not been designed to be read from front to back. Instead, you are encouraged to select the content that is relevant to you based on your discipline, role and the specific needs and timeline of your project. It is a starting point, and you can adapt and add to the guidance as relevant.

[4] Step 3: Understand stakeholder needs has two guidance notes

Delivery cheklists

Step 1: Agree social value purpose

What does this mean?

A social value purpose is a short statement that articulates, in no more than a few paragraphs, why you want your project to deliver social value.

Why is Step 1 important?

A clear social value purpose will ensure that your project team are working towards a shared goal - giving direction and focus to the project from the outset. It is also essential to understand why social value is important to the project and the benefit it can bring.
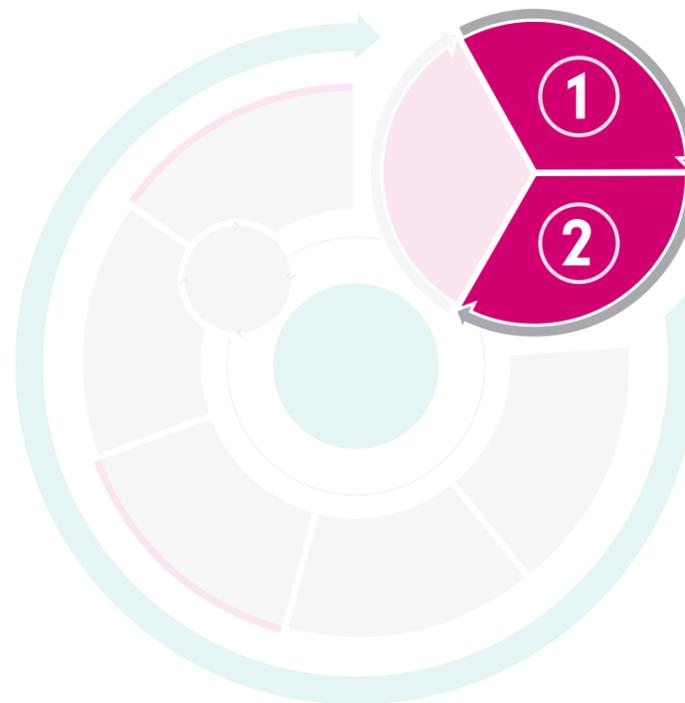
Step 2: Identify priority stakeholders

What does this mean?

Stakeholders are defined as people or organisations that experience change, whether positive or negative, because of your project. Priority stakeholders are those who are the most impacted by your project, both positively and negatively, during its planning, design, construction, and operation.

Why is Step 2 important?

Time, resource, and cost restraints could make it hard for you to meaningfully involve every stakeholder impacted by your project. Therefore, it is essential to spend time prioritising.

1. **Hold a social value workshop with your project team**	This workshop will determine whether your project team have a desire for the project to deliver social value.
2. **Identify any Local Authority requirements**	Consult relevant Social Value Strategy/Procurement Strategy.
3. **Look to similar projects for inspiration**	Use the case studies at the back of this guide for ideas and examples.
4. **Draft a social value purpose statement**	Your purpose statement should be concise, forward looking and aspirational.

For practitioner guidance see Guidance Note 1

1. **Agree your project's "sphere of influence"**	Agreeing your "sphere of influence" will help you to decide which stakeholders are in scope.
2. **Draw up an initial list of potential stakeholders that may be impacted by your project**	See the UKGBC Framework from Defining Social Value for example stakeholders separated by asset type and project lifecycle stage.
3. **Conduct a stakeholder prioritisation exercise**	A stakeholder prioritisation exercise will help you to determine which stakeholders are most impacted by your project.
4. **Create a bespoke stakeholder engagement plan for every priority stakeholder**	It is important to consider the specific needs of every stakeholder and tailor your engagement approach accordingly.

For practitioner guidance see Guidance Note 2

Step 3: Understand stakeholder needs

What does this mean?

Your priority stakeholders will have differing (and sometimes contradictory) interest in and expectations of your project.

Why is Step 3 important?

It is essential to conduct a rigorous assessment of stakeholder need so that your project can respond accordingly and deliver the social value needed most.

1. Conduct a local needs analysis

A local needs analysis is a systematic information gathering process that will help you to identify and evaluate the needs of your priority stakeholders.

2. Complete a social value mapping exercise to understand the social value currently being delivered through the built assets and initiatives that surround your project.

Your project is likely to be surrounded by other buildings and initiatives that aim to deliver social value. It is important to map out these assets and initiatives to ensure your project delivers complimentary social value initiatives.

For practitioner guidance see Guidance Note 3 and 4

Step 4: Agree social value outcomes

What does this mean?

Once you understand the needs of your priority stakeholders you should then collaborate with your project team and your priority stakeholders to compile a list of social value outcomes. Social value outcomes are organised into environmental, economic, and social outcomes to reflect the holistic nature of social value.

Why is Step 4 important?

Your list of social value outcomes will form the backbone of your social value delivery plan. Setting out your desired outcomes early will allow you to plan the initiatives you will undertake to deliver social value throughout your project lifecycle. Y**our delivery plan will be developed in Step 5.**

1. Draft an initial list of social value outcomes

Every social value outcome should meet a stakeholder need. An example outcome is local identity. Further examples can be found in Guidance Note 5 and UKGBC's Framework for Defining Social Value.

2. Hold a social value outcomes workshop with your project team to discuss your initial list and prioritise

Within this workshop you will agree a final list of social value outcomes that you wish your project to deliver.

3. Run your list of priority social value outcomes past your priority stakeholders

Your final list of social value outcomes should be agreed by all stakeholders, not just your project team.

4. Brainstorm a range of social value initiatives that will deliver your social value outcomes

Get creative. What initiatives will deliver your social value outcomes?

For practitioner guidance see Guidance Note 5
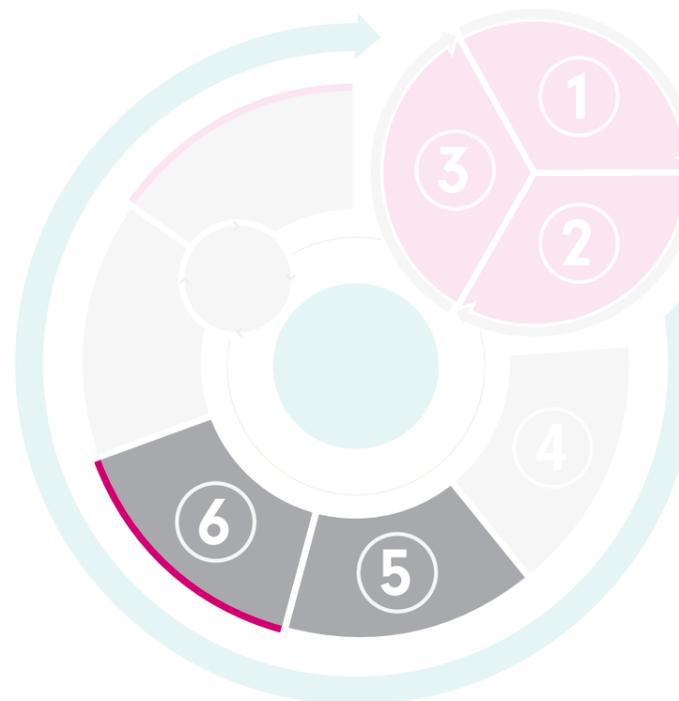
Step 5: Create a social value delivery plan

What does this mean?

Your social value delivery plan should outline the social value initiatives you intend to deliver to meet your social value outcomes.

It should include your plan for delivering your initiatives and outline those chosen to manage them. It should also outline your approach to measurement, monitoring and reporting (For practitioner guidance on measurement, monitoring and reporting see Guidance Note 6, Guidance Note 7 and Guidance Note 8).

Why is Step 5 important?

To develop a social value delivery plan, you will be required to think practically and ask yourself 'how' you will deliver your social value outcomes.

1. **Build your outline social value delivery plan**	Your Social Value Delivery Plan will provide the link between your early brainstorming of social value initiatives (Guidance Note 5) and the delivery of your social value outcomes.
2. **Set up a workshop with your project team, delivery partners and supply chain to discuss your social value delivery plan**	Your social value delivery plan is a live document. It is essential that all delivery partners are involved in its development.
3. **Edit your social value delivery plan based on any feedback received**	You should edit your social value delivery plan to reflect any comments/feedback received during the workshop.

For practitioner guidance see Guidance Note 6

Step 6: Put in place a social value measurement framework

What does this mean?

A social value measurement framework provides a structured methodology for quantifying and measuring social value consistently, facilitating clear and transparent reporting.

Why is Step 6 important?

A social value measurement framework links together your delivery plan, your planned social value initiatives and the delivery of your social value outcomes. It will also help you to communicate with your stakeholders and monitor your social value progress.

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1. **Review the attributes of potential social value measurement frameworks**	Consult Guidance Note 7 for a list of potential frameworks.
2. **Select a suitable measurement framework**	If you are unable to find a suitable framework that addresses your project needs, you should seek advice from a social value measurement expert.
3. **Select and finalise your list of social value measures**	Select a single measure or, if applicable, several measures for each of your social value initiatives.
4. **Establish your social value baseline**	Understanding your baseline is key to demonstrating additionality.
5. **Set SMART targets for each intervention in your social value delivery plan**	For every social value initiative you should have a SMART delivery target
6. **Seek feedback on your measurement framework from priority stakeholders**	Your measurement framework should be agreed by all stakeholders, not just your project team.

For practitioner guidance see Guidance Note 7

Step 7: Execute your social value delivery plan

What does this mean?

In your social value delivery plan, you should have planned how and when you will deliver your social value initiatives. You should now focus on delivering your social value initiatives.

Why is Step 7 important?

Step 7 is arguably the most important step in the process for delivering social value. This step is all about putting your planning from Steps 1 to 6 into action to successfully deliver your social value initiatives.

1. Execute your social value delivery plan

All that is left to do is to get on with delivering your social value initiatives.

For practitioner guidance see Guidance Note 8
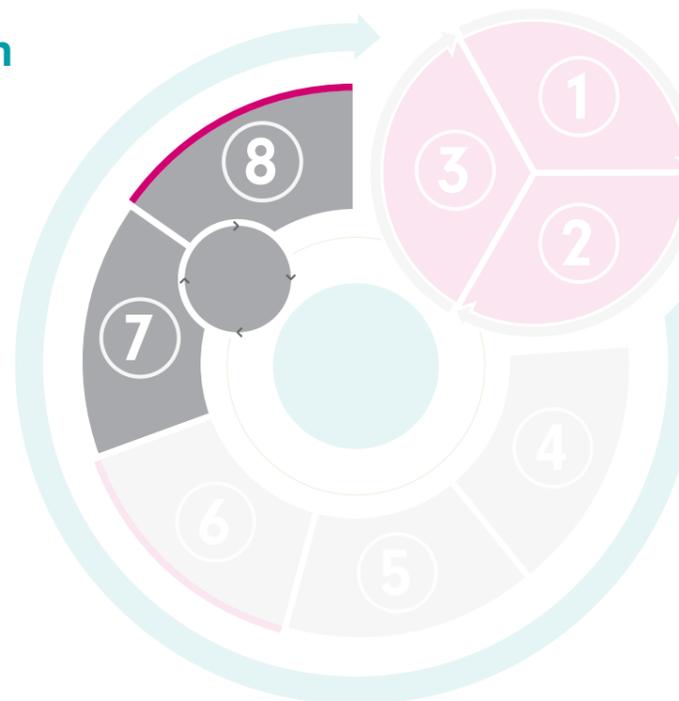
Step 8: Ongoing measurement, monitoring and reporting

What does this mean?

Monitoring is a data collection exercise that will provide you with evidence that your social value initiatives are being delivered as planned (or alert you to any potential issues). Monitoring should be undertaken regularly and be used to report progress against the social value measures and targets in your measurement framework.

Why is Step 8 important?

Monitoring and reporting should not be forgotten or seen as an 'add on'. It is vital and will help you to:

- Respond to issues quickly ensuring your social value initiatives deliver maximum impact
- Demonstrate your commitment to your stakeholders
- Reflect on lessons learnt to continuously improve standards, efficiency, and effectiveness

1. Undertake regular monitoring and respond to the results

Regular monitoring should be undertaken by named individuals.

2. Produce regular monitoring reports

You should produce regular monitoring reports that can be distributed to your project team and priority stakeholders.

For practitioner guidance see Guidance Note 8

Guidance notes |

Navigating a guidance note

Each guidance note corresponds to a step of the process for delivering social value. At the top of each guidance note you will find a link back to the relevant delivery checklist. There are eight guidance notes in total that provide task-by-task guidance for practitioners wishing to deliver social value on a built environment project.

They are not designed to be read in order, instead you are encouraged to select the guide that is suitable to the specific needs and timeline of your project. Equally, not every task included in each guidance note will be relevant to you; you can adapt and add tasks as relevant.

Key

To make each guidance note as straightforward as possible, icons have been used to flag tasks, useful information, examples, and common mistakes.

| **Task** | **Useful information** | **Example** | **Common mistake** |

1. Agree social value

Your main deliverable is	• A social value purpose statement

Hold a social value workshop with your project team

Who you invite will vary depending on your project. However, you should consider including the following people:

- The Client
- The Project Sponsor
- Delivery Partners
- Supply chain representatives (if relevant)
- The Project Director/Project Manager

- The Sustainability Lead
- The Stakeholder Engagement Lead
- Practitioners who will be responsible for the day-to-day management/delivery of social value on your project

Example social value workshop agenda

What is social value?

A brief social value overview to ensure your project team have a basic level of understanding. You may wish to reference UKGBC's Framework for Defining Social Value or ask your project team to complete the UKGBC Social Value Course mail ahead of the session.

Think about 'who'

Who in your project team will be responsible for managing your social value delivery approach? Who needs to be involved throughout the process? How often will you meet? What are the governance arrangements?

Think about 'why'

Why would you like your project to deliver social value? What motivates your project team? What would get your team excited?

Think about what is achievable

Spend some time as a project team considering what you would like to achieve given your project type, length, budget etc.

Identify any Local Authority requirements

A Local Authority may have published a social value strategy or plan. If one is available for your area, this will be a good source of information and may help you decide how your project will contribute to the broader strategic goals of the locality.

Look to similar projects for inspiration

Example case studies can be found at the back of this guide. Questions you should consider when reviewing examples are:

- What social value outcomes have they been able to achieve?
- How have they delivered social value?
- What have they done successfully?
- Are there any lessons to be learnt?

Draft a social value purpose statement

Using the information you have gathered from your social value workshop and case study review, draft a social value purpose statement. It is important that your purpose statement is:

- Clear and concise
- Forward looking
- Aspirational
- Project-specific

See case study:
Greening Swinton Square and Opportunity

Once you have drafted your purpose statement, present it back to your project team for final approval.

Your final social value purpose could be included in the client's requirements and/or the project Business Case. Securing the social value vision in the client's requirements or Business Case will increase the likelihood of social value outcomes being embedded in future stages of the project lifecycle.

2. Identifying priority stakeholders

Your main deliverable is	• An initial list of stakeholders
	• A completed stakeholder prioritisation table (Table 1)
	• A bespoke Stakeholder Engagement Plan for every priority stakeholder (Table 2)

Agree your project's "sphere of influence"

Before you begin to brainstorm the stakeholders that may be impacted by your project, it is important to take a step back and consider the following:

- Are you working on a major project?
- What is the expected project budget?
- How long do you expect your project to take?
- What will your supply chain look like?
- What are your project drivers?
- Is your project likely to impact the lives of people on a single street? A town? A major city? A region?

Discussing your projects "sphere of influence" will help you to prioritise stakeholders by geography.

Check if your project already has a Strategic Outline Business Case (SOBC) or Outline Business Case (OBC). A geographical boundary may have already been agreed.

Draw up an initial list of potential stakeholders that may be impacted by your project

To begin prioritising your stakeholders you should draft an initial list of stakeholders in collaboration with your project team. The aim of the initial stakeholder list is to capture all possible stakeholders that may be impacted by your project in some way. Your list may include existing residents, your delivery partners (e.g., the developer, landowner or investor) or your suppliers. See the UKGBC Framework for Defining Social Value for an example list of stakeholders separated by asset type and project lifecycle stage.

See case study:
White Collar Factory

To ensure your list of stakeholders captures as many potential stakeholders as possible the following activities may help:

- Gather evidence of stakeholders impacte by similar projects
- Look at your relevant local authority documentation (e.g., Local Plan)
- Involve visible community stakeholder groups such as resident associations, local service providers, community groups and local charities
- Involve marginalised community groups such as local LGBTQ+ charities, asylum seekers or elderly people
- Consider the geographical distribution of people interacting with the building or asset
- Consult the building use data of existing buildings

When identifying stakeholders, it is easy to assume that they share enough common characteristics to form a single group, like the 'local community' or 'local businesses'. However, individual members of these stakeholder groups may want the project to achieve different outcomes depending on their age, economic status, or other factors. If you think these differences are likely to be significant, split your stakeholders into sub-groups.

Your project site may be located next to the head office of a large multi-national organisation and close to a street of local independent food retailers. The local independent food retailers may be impacted more significantly by the increased traffic your project may bring to the area during the construction phase as their customers often park on the road to pick up their shopping. As a result, you may wish to split 'local businesses' into 'large businesses' and 'local micro, small and medium enterprises (MSMEs)' in your stakeholder list.

Conduct a stakeholder prioritisation exercise

A stakeholder prioritisation exercise will help you to determine stakeholders that experience a significant impact from your project. You should think about the outcomes of the project from a stakeholder perspective and consider both intended and unintended outcomes.

Set up a table like **Table 1** below. Put all the stakeholders from your initial list into the first column and your initial assessment of how they affect or are affected by the project. Next, decide which stakeholders are impacted significantly (positively and negatively) and give an explanation in the second column. In the third column, decide whether to involve or exclude that stakeholder, giving a clear justification for this choice.

Stakeholders Affect the project? Affected by the project?	Is it positive or negative?	Involve or exclude?
Local MSMEs	Increased traffic during the 10-year construction period may result in a loss of income	Involve as the project will need to plan how to mitigate any negative impacts from increased traffic

Table 1

In most instances, the stakeholders most negatively impacted by the project should be your priority. Remember to justify your decision clearly in column 3. You may need to share your reasoning with other stakeholders as your project progresses.
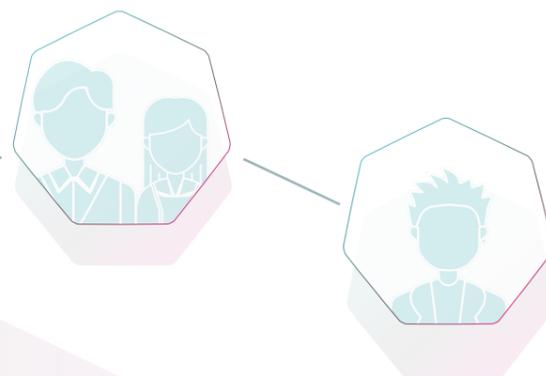
Create a bespoke stakeholder engagement plan for your priority stakeholders

It is important to consider the specific needs of your priority stakeholders and tailor your engagement approach accordingly. Before completing **Table 2** below it is important to be sensitive to the amount of time and resource stakeholders can give, as well as the inputs, outputs, and outcomes you wish to achieve from your engagement. This will ensure that time is used as efficiently as possible. You should also consider the ways in which your project team are already gathering stakeholder data and see if you can make use of these.

Stakeholder (Who)	Engagement objectives (Why)	Method (How)	Timing (When)	Person responsible (Who)
Local MSME owner (existing business)	Understand their views of the proposed development	One-to-one interview	April 2022	Stakeholder engagement manager

Table 2

Set up a table like **Table 2**. Put all the stakeholders you have decided to involve (from Table 1) in the first column. For each stakeholder consider why you would like to involve them and set out several engagement objectives in the second column. In the third column choose an engagement method (or multiple methods) that best suit to your engagement objectives. You could use the following methods to engage stakeholders:

- Stakeholder workshops
- A survey
- Observation sessions
- Focus groups
- One-to-one interviews

In column four and five plan when the engagement will occur and name a responsible individual who will manage the stakeholder relationship.

New or missed stakeholders may become known to you as the project progresses. As such, **Step 2: Identify priority stakeholders** may need to be revisited and stakeholders re-prioritised at regular intervals.

3. Conducting a local needs analysis

Your main deliverable is	• A local needs analysis
	• A list of priority needs

Collect data through stakeholder engagement and desk-based research

Before you begin collecting data for your local needs analysis you should agree on a data storage, management, and analysis approach with your project team.

You may wish to use a Microsoft Excel spreadsheet in combination with an analytics software platform such as Power BI to present your data.

There are two ways to gather data for your needs analysis:

1. Engage directly with your list of priority stakeholders

- Stakeholder engagement will generate a wealth of primary data for you to analyse and help you understand the issues that are material to your priority stakeholders.

- There are a variety of methods to engage stakeholders and collect your data. See Guidance Note 2 for examples. Each method will generate different types of data.

To gather data from your stakeholders you will need to execute the bespoke stakeholder engagement plans you produced in Guidance Note 2.

See case study:
Langarth Garden Village

2. Select relevant publicly accessible data sets

- Publicly accessible secondary data will help you to assess the social, economic, and environmental needs of each priority stakeholder identified.

- You should focus your data collection within your projects "sphere of influence". This could be a Local Authority, a ward or a City Region.

A table of suggested data sources can be found in UKGBC's Delivering Social Value Measurement Guide.

Understanding the needs of your supply chain may need to be a speculative exercise based on the required goods and services. If your project already has a supply chain in place the sustainable procurement strategy will be a valuable source of information.

See case study:
Yorkhill

Organise and analyse your data

Once you have collected your primary and secondary data you are able to move onto your data analysis. There are several principles that should structure your data analysis approach:

- It is useful to organise your data into several themes or focus areas. For example, educational attainment, housing, or health. Organising your data this way will help with agreeing your final social value outcomes.

- It may be relevant for you to assess change over time, which can be done using past data sets. You can do this by comparing data sets across several years. For example, ONS data sets like the Census are published every 10 years. Try to be consistent with the date range of your data. This will allow for more accurate comparison across themes.

- Where possible, use open-source data from a trusted source. This will allow your priority stakeholders to consult the original data themselves, if required.

If your stakeholder engagement data includes recurrent priorities, issues, or concerns this indicates a stakeholder need. Similarly, if your local data compares poorly to national benchmarks this indicates a stakeholder need.

Present your results

You may wish to present your local needs analysis back to your project team and priority stakeholders, so make sure the results are in an accessible format. The results of a local needs analysis are usually presented in a report, organised using the themes from your data analysis as headings. The report should contain graphs, tables, and charts with accompanying explanatory text to highlight key trends and findings in a simple, accessible way. Data visualisation software may be a useful tool for presenting your data.

4. Completing a social value mapping exercise

Your main deliverable is	• A social value map • A list of priority needs

Your project will not operate in isolation. It will likely be part of a wider network of infrastructure and built assets. Understanding the social value initiatives that already surround your project will help you to deliver additional social value and prevent duplication of effort.

⚠️ If two major developments target the same three schools for work experience placements this will not only inconvenience the schools involved but limit the social value delivered in the local area.

There are numerous ways to get a better understanding of the social value initiatives that surround your project:

Talk to a gatekeeper organisation

Community organisations or Local Economic Partnership (LEPs) will have a good grasp of what is currently happening in your local area.

Talk to other project teams

Your project will likely be surrounded by other projects, some of which may also wish to deliver social value initiatives. Talking to other project teams at this point may lead to new partnerships and collaboration.

Engage closely with the Local Authority

A Local Authority will understand what is currently being delivered in their area and where the emerging gaps are. if you are unable to engage with the Local Authority directly, you should conduct a review of relevant strategy documents. This could include a Local Plan, Sustainability/Net Zero Strategy, Inclusive Growth Strategy, Health and Wellbeing Strategy or other relevant strategic planning documents.

5. Agreeing social value outcomes

Your main deliverable is	• A list of social value outcomes

Draft an initial list of social value outcomes

To complete this task, you should have identified your priority stakeholders (Guidance Note 2), assessed local needs (Guidance Note 3), and understand what social value initiatives already surround your project (Guidance Note 4). You should now draft an initial list of social value outcomes that you wish your project to deliver during its lifecycle. Example outcomes include:

- Security and safety
- Green space
- Air quality
- Employment and skills

For a full list of outcomes see UKGBC's Framework for Defining Social Value.

This list of social value outcomes should be divided into themes that mirror those in your local needs analysis (Guidance Note 3).

Set up a social value workshop with your project team to discuss your initial list of social value outcomes

Once you have drafted an initial list of social value outcomes it is important to discuss the list with your project team. The aim of this workshop is to refine the initial list and agree the final list of social value outcomes that your project wishes to deliver. Your project team will bring unique experiences and perspectives. It is important to bring them on board now because they will share collective responsibility for your social value delivery plan (Guidance Note 6).

To help narrow down your initial list of social value outcomes, you should conduct a weighting exercise. This exercise should be based on:

- The needs of your priority stakeholders - go back to the results of your local needs analysis and social value map
- Your project's social value purpose

You could use a matrix like the one below to structure your weighting exercise. Plot each of your social value outcomes onto the matrix. The outcomes that end up in the top right-hand box are deemed priority outcomes by the stakeholders in your workshop.
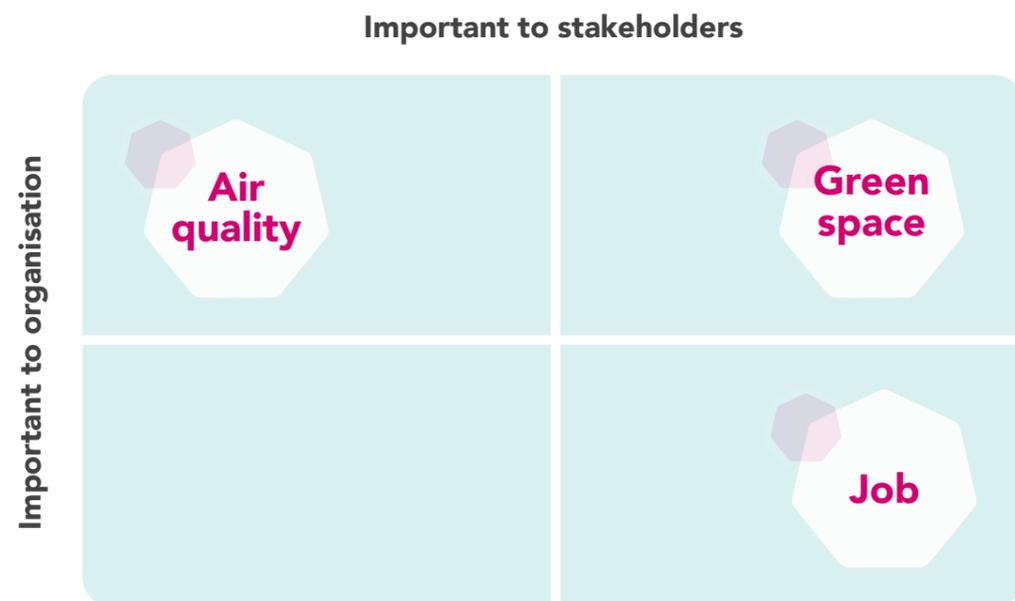
Important to stakeholders

Important to organisation

Air quality

Green space

Job

Figure 2: Weighting matrix

Your weighting exercise should be used to create a final list of social value outcomes for your project. It should also inform your SMART targets, a key part of your social value measurement framework developed in Step 6: Put in place measurement framework (See Guidance Note 7).

You may wish to set higher targets for outcomes that have been ranked as high priority. At the end of this workshop, you should have a final list of social value outcomes.

A suggested workshop agenda:

Present a brief update on your work completed to date Summarise the results of your local needs analysis and social value mapping exercise	**A weighting exercise** Consider using Figure 2 to facilitate this exercise
Explain your long list of social value outcomes Breakdown the thinking behind each outcome on your longlist, what need does it address?	**Finalise a list of social value outcomes based on the results of your weighting exercise and discussion** Draw up a final list of social value outcomes

See case study: Larkhall Park

Run your final list of social value outcomes past your priority stakeholders

If possible, your final list of social value outcomes should be agreed on by your priority stakeholders - not just your project team. To ensure your chosen outcomes accurately reflect the needs and requirements of your priority stakeholders provide them with your final list of outcomes for comment. You can do this by meeting your stakeholders in person or sending them a draft list by email. This will maintain the golden thread §of stakeholder engagement.

Brainstorm social value initiatives that will help you to deliver your social value outcomes

Working with your project team consider what social value initiatives will help you to deliver your social value outcomes. You do not need to plan these in detail at this point, this is about getting ideas down on paper.

6. Creating a social value delivery plan

Your main deliverable is	• A social value delivery plan

Build your outline social value delivery plan

Your social value delivery plan will provide the link between your early brainstorming of social value initiatives from Step 5: Agree outcomes (<u>Guidance Note 5</u>) and the delivery of your social value outcomes. A well-defined plan will provide clear direction when it comes to steps that are to be taken, and when they should be completed. It can be structured in a way that meets the needs of your project team and there are no limitations in terms of style.

You should include the following elements in your plan:

- **A description of every social value initiative you wish to deliver throughout your project**

  Narrow down the list of social value initiatives that you brainstormed in Step 4: Agree outcomes (Guidance Note 5) into a manageable list. Your initiatives could be organised by social value outcome.

- **A 'mini' delivery plan for every social value initiative you wish to deliver throughout your project**

  Each initiative should be treated like a mini project. Dedicating time to planning each initiative will help you to understand whether the initiative can be delivered successfully.

- **Named delivery partners or organisations that will support the delivery of your social value initiatives**

  You may wish to partner with other organisations to deliver some of your social value initiatives. You should outline these relationships and state how you anticipate working with them.

- **An assigned owner for each social value initiative**

  An owner is the individual or team responsible for the delivery of your initiatives, and for ensuring they are not overlooked or intentionally deprioritised.

It may also be useful to assign ultimate accountability for initiatives to a senior member of the project team (e.g., the Project Manager). This individual should be accountable for the overall delivery of the Social Value Delivery Plan.

- **A monitoring plan**

  Your monitoring plan should summarise your approach to monitoring and reporting the delivery of your social value initiatives in a concise manner. It should contain:

  - A review timeline - how often will you expect initiative owners to report progress?
  - Roles and responsibilities - who will manage your measurement framework and the monitor progress?
  - Named data guardians
  - What data will you need to collect to monitor progress - this should be informed by choice of social value measurement framework (Guidance Note 7)
  - How will you report your progress - will you use a dashboard? A RAG rating system?

Your monitoring plan will be informed by your chosen social value measurement framework.

See case study:
GPE Social Impact

- **A risk register**

  Your risk register should be used to document any delivery risks you identify, to plan your response, and assign clear ownership.

Set up a workshop with your project team and relevant priority stakeholders to discuss your social value delivery plan

Your social value delivery plan should be treated as a live document. The aim of this workshop is to:

- Mobilise your project team and priority stakeholders to own and deliver the plan
- Inform people of their roles and responsibilities (e.g. managing the delivery of an initiative or responsible for a risk)
- Brief your project team and relevant priority stakeholder on your approach to measuring, monitoring, and reporting
- Gather feedback on the plan

The priority stakeholders that are likely to be relevant here are the client, your delivery partners and your supply chain.

Edit your social value delivery plan based on any feedback received

You should edit your social value delivery plan to reflect any comments or feedback received during the workshop to ensure you have maximum buy-in.

Step 6: Put in place a social value measurement framework

7. Putting in place a social value measurement framework

| Your main deliverable is | • A social value measurement framework |
| | • A social value baseline |

Review the attributes of several potential social value measurement frameworks

The built environment sector is using a variety of different social value measurement frameworks. Some of these frameworks may be suitable for the specific needs of your project, while others may not. It is important to spend some time assessing the strengths and weaknesses of several frameworks before deciding which framework is right for you. For a list of available measurement frameworks consult UKGBC's Social Value Measurement Guide. Impact Reporting have also published a list of social value measurement frameworks here.

The most important question to consider when assessing a potential social value measurement framework is whether the framework contains a suitable "measure" for assessing the impact of the social value initiatives you included in your Social Value Delivery Plan (Guidance Note 6).

A measure (or 'indicator') is a way of quantifying your outcomes. During your assessment you should also consider whether:

• Your project team and your priority stakeholders wish to understand the equivalent £ value of your social value initiatives. If so, your chosen framework should include financial proxies for some or all measures.

• It is important that a measurement framework has been tested in the built environment.

• The social value initiatives you have planned for can be measured using quantitative and/or qualitative measures.

Select a suitable measurement framework

Social value measurement is a specialist discipline. If you are unable to find a suitable framework that addresses your project needs, you should seek advice from a social value measurement expert, who may be able to develop a bespoke measurement framework for you.

See case study:
Social Value Snapshot and Brent Cross Town

Select and finalise your list of social value measures

Select a single measure or, if applicable, several measures for each of your social value initiatives. A measure helps you to quantify your impact and monitor delivery progress. For every measure in your framework, identify what data you will need to collect to evidence and monitor progress. Refer to the monitoring plan you developed in Step 5: Create a social value delivery plan (Guidance Note 6).

Establish your social value baseline

Your measurement framework should only capture social value that is additional, and a direct result of your project.

Deadweight is what would have happened anyway without your social value initiative

Additionality is the opposite - what wouldn't have happened if you hadn't undertaken your social value initiative

Attribution is how much social value can be credited to your social value initiatives
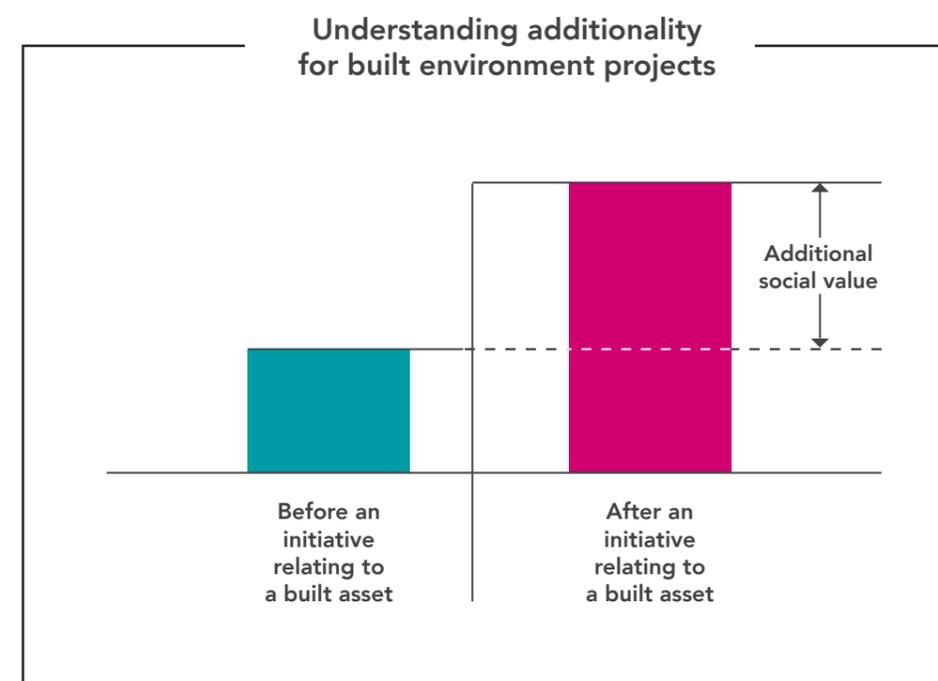
Understanding additionality for built environment projects

Additional social value

Before an initiative relating to a built asset

After an initiative relating to a built asset

Figure 3:
Understanding additionality

To work out the additional social value you can attribute to your social value initiatives, and not overclaim, you need to understand your baseline. This is an exercise to understand the current "state of play" for each of your planned social value initiatives. The data you will need to collect will vary initiative by initiative. For example, you may need to collect data to evidence an increase in green space (difference between pre-project green space and post-project green space in m2). You may have already collected the data required as part of your Local Needs Analysis (Guidance Note 3).

1. Your social value outcome is 'local employment'

2. Your social value initiative will involve 'employing local people during the construction phase of your project'

3. Your measure could be 'number of local people employed by the project during the construction period'

4. If no local people are currently employed by your project as construction has yet to start, your baseline number of jobs would be 0.

Consider whether you have created additional local jobs, or have you simply employed local construction workers who, if your project was cancelled, could get another job on a nearby site.

Can you attribute all the social value to your project? To determine attribution you will need to use your own judgement and determine how much your project is contributing to the change. More information on estimating attribution can be found in the following Social Value UK Guide.

Set SMART targets for each intervention in your social value delivery plan

For every social value initiative you have proposed to deliver during your project you should have:

- A delivery plan
- An appropriate measure selected
- An understanding of the current baseline

Don't forget to refer to the outcome weighting exercise you conducted in Step 4: Agree social value outcomes. You may wish to set higher targets for initiatives that deliver the social value outcomes that scored highly (Guidance Note 5).

Based on this information, you should set a SMART target for each initiative.
S = Specific M = Measurable A = Achievable R = Realistic T = Timebound

Using the same worked example as above. Your SMART target could be to 'employ 50 local people during the construction phase (lasting from 2023-2025)'. Your targets will help you to focus during your delivery phase. For more information regarding social value measurement, UKGBC have published a dedicated guide that can be found here.

8. Deliver, monitor and report

Your main deliverable is	• Social value initiatives that deliver your social value outcomes • Regular, publicly available monitoring reports

Execute your social value delivery plan

Select a single measure or, if applicable, several measures for each of your social value initiatives. A measure helps you to quantify your impact and monitor delivery progress. For every measure in your framework, identify what data you will need to collect to evidence and monitor progress. Refer to the monitoring plan you developed in Step 5: Create a social value delivery plan (Guidance Note 6).

Undertake regular monitoring and respond to the results

Regular monitoring should be undertaken by the individuals named in the monitoring section of your social value delivery plan (Guidance Note 6). Progress should be recorded using your agreed approach.

Monitoring is an iterative process and the data you collect should be used to change your social value initiatives if needed. You may discover during a monitoring exercise that one of your initiatives is failing to deliver the impact you had targeted. Regular monitoring will allow you to recognise this early and work together with those responsible for that initiative to get things back on track. Monitoring is also a great way to capture and celebrate your success.

See case study:
Department for Transport – Floodwater Management Grant

Produce regular monitoring reports

As part of your ongoing monitoring, you should produce regular, publicly available monitoring reports. Your monitoring reports should be:

- Visual
- Clear and succinct
- Cater to their intended audience
- Be transparent - make sure you are honest if some of your initiatives go awry
- Follow a logical structure

It is best practice to seek third party assurance and/or verification of your social value delivery approach. Social Value UK offer a verification service. More information can be found here.

Conclusion |

Delivering social value on built environment projects is complex. This guide includes a set of delivery checklist for senior decision-makers who are responsible for overseeing major built environment projects, and detailed guidance notes for practitioners who have the power to influence day-to-day delivery. This guide recognises that there are challenges facing senior decision-makers and social value practitioners alike:

There is no one size fits all approach

How and what you deliver will depend on the length of your contract, your role on the project and the project itself. Providing a task-by-task guide that covers all potential scenarios (asset type, contract type, lifecycle stage) is not feasible. Instead, this guide focuses on the fundamental steps of a best-practice delivery approach that is applicable across project types and beneficial at all stages of the asset lifecycle.

Handover between delivery partners

As your project progresses through its lifecycle, many delivery partners will be involved. This brings additional challenges.

CHALLENGE 1

Every organisation will bring their own approach to delivering social value and navigating this can be difficult

CHALLENGE 2

It is hard to assign ultimate responsibility for social value delivery when it will have different "owners" as the project progresses

CHALLENGE 3

Handing over what you have done and what needs to be done to a new delivery partner is complex and often outside of your scope

Commercial and contractual limitations

Every delivery partner will be subject to a range of commercial and contractual limitations. Individual contracts are usually set up to deliver a discrete package of work (e.g., to get a project through planning or to complete the preliminary design of a building). As a result, delivery partners are rarely accountable for social value delivery across a projects entire lifecycle. Individual delivery partners may also have little influence over the strategic vision of the project. This strategic oversight usually rests with the client. This segmented approach to project delivery can limit the type of social value initiatives that can be achieved because delivery partners are constrained by their scope of work and power to influence.

Long time frames

Some social value outcomes may not be realised until many years after a project is completed. It is essential that a responsibility for measuring, monitoring, and reporting is included in management contracts to ensure long-term value is captured.

We hope that built environment professionals from across the value chain find this guide useful and they use it to inform their social value delivery approach in the future.

Brent Cross Town |

Project location	London Borough of Barnet
Project partners	Argent Related and Barnet Council – Joint venture – Buro Happold and University of Manchester – Research/consultant lead
Asset type	New town centre development
Where is the project in the asset lifecycle?	Initial construction has begun The 'Flourishing Index' is under development
Completion date	From 2024

Project overview

Brent Cross Town is a £7bn new town centre development for London set around 50 acres of parks and playing fields. The scheme includes 3 million square foot of office space, 6,700 new homes, student accommodation, restaurants and sports and leisure facilities. Construction started in 2020 and the first permanent buildings will be completed in 2024.

The Joint Venture partners (Argent Related and Barnet Council) are currently working with University of Manchester and Buro Happold to undertake innovative quantitative and qualitative research to develop a 'Flourishing Index' for Brent Cross Town. The 'Flourishing Index' will be used to inform social value target-setting and the development of a Social Value Delivery Plan.

What makes the project interesting?

- The project is an example of a joint venture that has leveraged UK Research Council and match-funding to create transdisciplinary MA and PhD opportunities.
- It is expected that all anonymised data collected will be open source. This will be achieved by working with Data for London.
- The project involves the innovative use of both routinely collected and bespoke data, drawing on established and novel digital techniques. Both datasets were analysed based on input and interpretation from local people, stakeholders, professionals, and experts giving a deep understanding of the data.
- Drawing on Medical Research Council and Nesta research standards, the project goes beyond Post Occupancy Evaluation, collecting 'before and after' data, providing a unique opportunity to understand additionality.

Social value outcomes

The 'Flourishing Index' includes:

- Subjective Wellbeing (SWB)
  - Personal SWB outcomes (hedonic and eudaimonic) e.g. "life going well for me"
  - Social SWB outcomes e.g. life going well for "us"
  - Specific SWB outcomes including satisfaction with key aspects of life such as income, jobs, and housing.
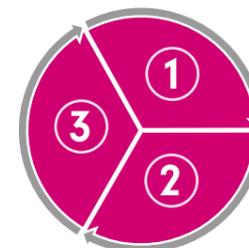- Key wellbeing activities e.g. Connect, Be Active, and Take Notice.

Social value delivery approach

The 'Flourishing Index' is only one part of the social value delivery approach for Brent Cross Town. Over a three-year timeframe the following has been delivered:

Steps 1, 2 and 3

- Argent Related with support from Buro Happold developed a Sustainability Strategy that set out a vision for Brent Cross Town to become a thriving and inclusive exemplar of urban regeneration. Desk-based research was used to understand local need and inform the Sustainability Strategy. This included analysis of previous stakeholder consultation, key local authority documents and various publicly accessible local datasets including ONS wellbeing scores and Joint Strategic Needs Assessments.
- Online discussion groups were then held with a representative group of local community members (led jointly by University of Manchester and Buro Happold). These focused on understanding stakeholder definitions of health and wellbeing, and the priorities for change locally. The approach was based on the UK What Works Centre for Wellbeing and the National Institute for Health Research's public engagement guidance. The findings of this work underpinned an initial Theory of Change, in turn, providing further foundations for the following steps.

Steps 5 and 6

- Rather than develop a social value delivery plan before putting a social value measurement framework in place Brent Cross Town needed a measurement framework to gather bespoke baseline data, ahead of the first major phases of Brent Cross Town delivery. The University of Manchester used a mixed-methods data collection approach, including intercept and online surveys (more than 1,500 participants), direct and automated behaviour observations (more than 10,000 observations), and air pollution monitoring. For each dataset, a matched UK or European comparison was sought.

Steps 3 and 4

- To add further detail to the baseline data, complementary engagement activities with local stakeholders (community, businesses, local charities) were organised to plug any gaps in evidence. This led to a more comprehensive list of outcomes and indicators within the 'Flourishing Index'.

Step 5

- As part of preparation for a forthcoming Social Value strategy, examples of national and international best practice were compiled.

Step 8

- To continue the 'golden thread' of stakeholder engagement, the baseline findings and best practice examples were co-interpreted, to set salient and ambitious targets – providing 'north stars' to guide the Social Value Strategy and planned ongoing monitoring.
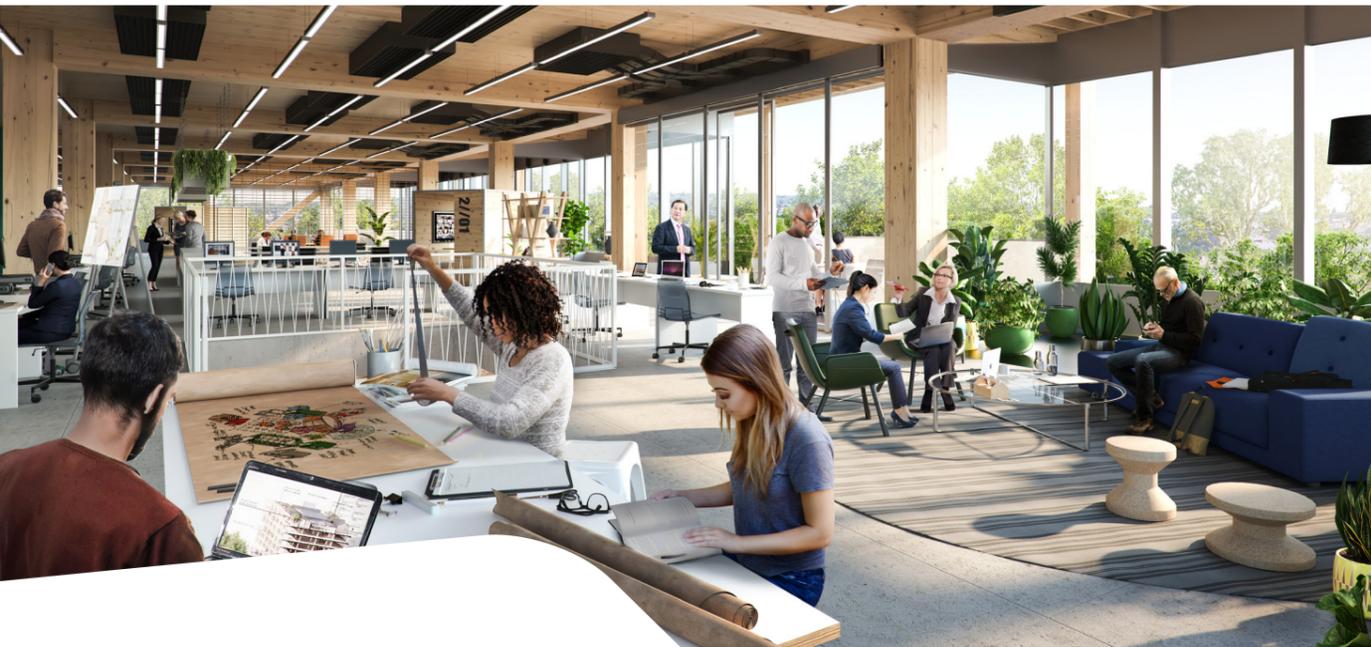
Future considerations

- Develop a social value delivery plan and an approach for ongoing monitoring and reporting.

- The survey work involved working with adults and future work will look at developing a Flourishing Index for children and teenagers.

- Consideration of global social impact via supply chains and local sustainable behaviours that may overlap with experiences of wellbeing.

Social Value Snapshot |

Project location	United Kingdom
Project partners	CBRE Investment Management – Client CBRE Advisory – Consultant
Project type	A tool for measuring the social impact or social value of real estate assets, including retail, offices, industrial and residential.
Completion date	September 2021

Project overview

CBRE Advisory have developed a proprietary tool, the Social Value Snapshot, to measure the social value of real assets. The Social Value Snapshot plugs the current gap in the "S" of ESG by allowing repeatable and accountable quantitative analysis of the social value of buildings. The tool aims to move real estate asset managers and occupiers away from isolated case studies of good practice to measuring and reporting on social value in a repeatable and quantitative way at the asset and portfolio level.

In 2021 the tool was piloted across ten assets from one of CBRE Investment Management's UK based funds The ambition of the pilot was to provide CBRE Investment Management and their investors with insights into the communities that their assets are a part of, to benchmark the social impact of different assets against each other and to identify opportunities for delivering social value at scale. The pilot ran from June to September 2021.

What makes the project interesting?

Getting to understand the needs of those communities through traditional community consultation methods would be prohibitively expensive. This challenge is particularly acute for real estate investors, who will typically have many investments in geographically disparate locations. The Social Value Snapshot is a cost-effective solution that provides high level insights into the needs of communities and can highlight where assets are having a positive or negative impact.

Social value outcomes

The Social Value Snapshot provides a unique score for each asset based on the ten outcomes listed below:

- Economic regeneration
- Employment
- Skills and education
- Health
- Environment
- Safety and security
- Community
- Connectivity
- Diversity and inclusion
- Climate resilience

The score is informed by the building design and operation as well as the local area and demographics. Crucially, the magnitude of social value depends on local need. The relative weighting of each of these themes will also depend on the strategic priorities of the client and the needs of the local community.

Social value delivery approach

The Social Value Snapshot has been developed over the past three years by CBRE's ESG Consultancy team in partnership with their research team in response to an industry need for better measurement of the social factors when reporting on the ESG credentials of real estate investments. The tool was developed to focus on asset performance rather than contract performance; each outcome speaks to the unique benefits that communities and wider stakeholders gain from their built environment. The tool also uses local area and demographic data to inform the estimated value of a building to the community, allowing for a more advanced evaluation of social impact.

Steps

1 2 3 4 5 6 7 8
5

The process for running the Social Value Snapshot is as follows:

Step 2

- Identify the communities impacted by the building(s) being assessed.

Step 3

- The identified communities then inform the geographical boundary of the local demographic data to be analysed.

Step 4

- The next step is to agree which of the outcomes or thematic areas within the tool are most material to the client and priority stakeholders.

Step 6

- Surveys are then issued to Property Managers and Building Managers to gather information about the building itself. These are combined with the local area data to create a social value score for each asset, and "establish the baseline".

- From this analysis opportunities for delivering social value are identified and assessed in terms of their Social Return on Investment.
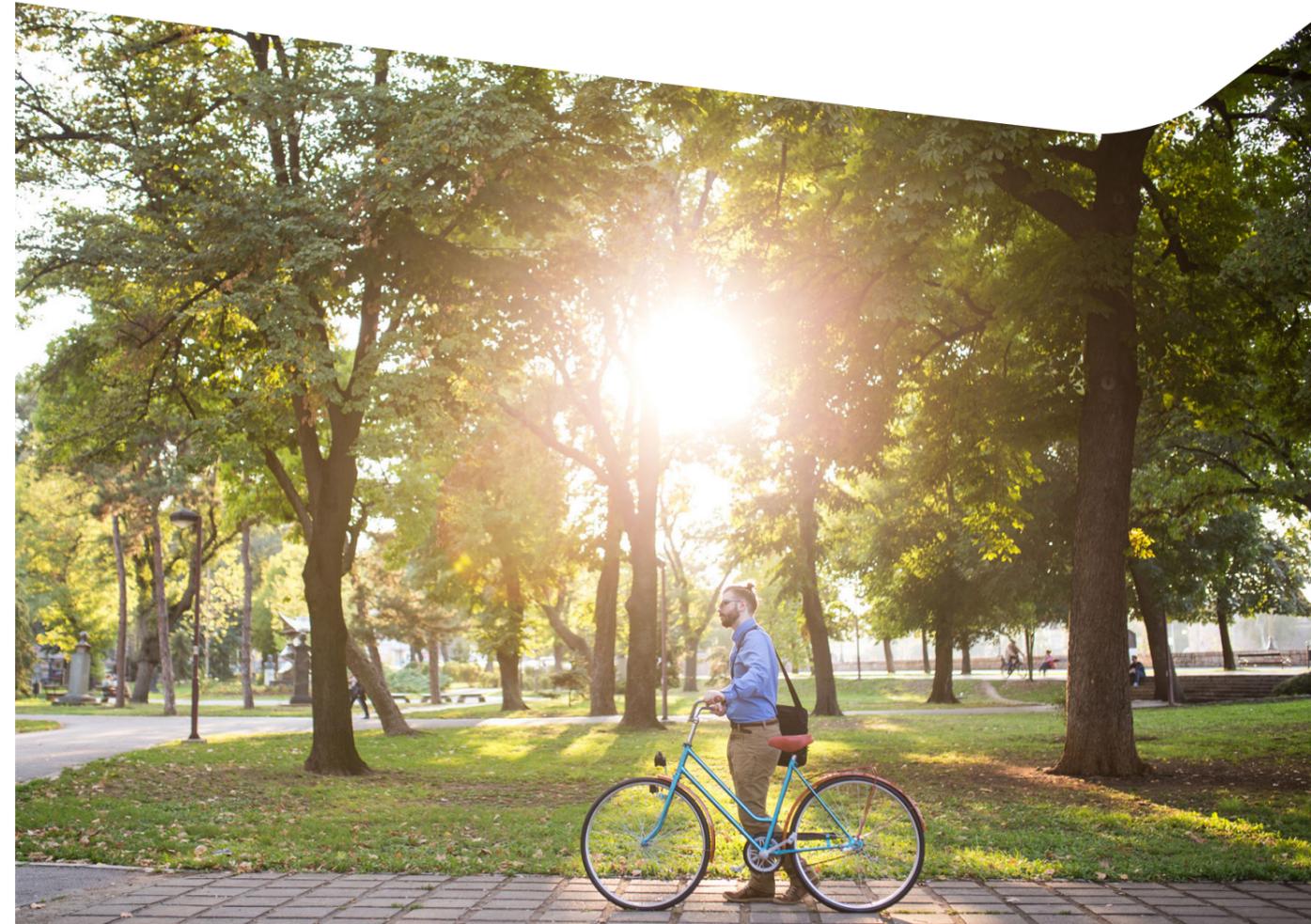
Step 8

- The measurement exercise forms the basis of the framework for ongoing monitoring and reporting.

Step 5

- These opportunities, supported by targets, KPIs and a roadmap for delivery, form the basis of a strategy and delivery plan.

Future considerations

The current tool does not include any direct community engagement or consultation. This is deliberate, as consulting the local demographic data provides a cost-effective alternative. However, there is engagement with the building occupants throughout. Where the tool recognises areas of high deprivation or low asset performance CBRE plans to work with clients on targeted community consultation exercises to better understand the opportunities and challenges for that site.

GPE Social Impact Strategy |

Project location	London
Project partners	GPE – Client Hoare Lea and CHY Consultancy – Consultant
Project type	Corporate Social Impact Strategy
Completion date	November 2021

Project overview

GPE commissioned Hoare Lea and CHY Consultancy to develop an organisational Social Impact Strategy to supersede their existing Community Strategy. The Social Impact Strategy, published in November 2021, sets out how GPE will deliver its commitment to create at least £10 million of social value in its local communities by 2030. It is closely aligned to GPE's Sustainability Statement of Intent 2030 and their People Strategy.

What makes the project interesting?

- The project shows how an organisational social value strategy can adopt a hyper-local approach to impact. All the priority outcomes included in the strategy are designed to address the needs of communities and priority stakeholders local to GPE's projects and managed portfolio.

- The strategy includes commitments, activities and targets that are not commonly featured in mainstream social value strategies, such as designing and operating inclusive and accessible buildings.

- It is an example of an organisational strategy that sets out commitments and targets that will trickle down to a project level delivery plan that can be implemented on the ground.

Social value outcomes

The GPE Social Impact Strategy is divided into four pillars:

- Enabling healthy and inclusive communities
- Championing diverse skills and accessible employment opportunities
- Supporting the growth of local businesses and social enterprise
- Connecting people with urban nature

Commitments and measurable activities are specified for each pillar to enable the objective monitoring of progress. Diversity, equality and inclusion was also identified as an overarching outcome for the strategy, with all other elements linking back to this in some way.

Social value delivery approach

To develop the strategy Hoare Lea and CHY Consultancy undertook the following activities:

Steps 1 → 4 ▸ 5 ▸ 6
1 2 3 4 5 6 7 8

Step 3

- Desk-based research to understand the demographic, socioeconomic and educational needs of the six London boroughs in which Great Portland Estates operates.

Step 1

- Engagement with the GPE team to ensure that the strategy was truly reflective of GPE's ethos with full buy-in from senior management, and to get a range of perspectives from those who will be involved in delivering it. GPE's existing community partners and supply chain were also invited to input.

Steps 4, 5 and 6

- The findings from the desktop needs analysis and stakeholder engagement were used to identify the four key pillars and develop commitments, targets, and activities.

Future considerations

- Develop action plans identifying roles and responsibilities with respect to all commitments and targets.

- Measure and reporting progress against the targets and commitments at regular intervals, identifying both successes and opportunities for improvement.

- Review and update individual metrics on an annual basis to reflect progress and ensure the metrics remain relevant and ambitious enabling the continuous generation of 'additional' value.

Larkhall Park |

Project location	Larkhall, London
Project partners	Homes for Lambeth – Client Buro Happold – Sustainability and Social Value Strategy Waugh Thistleton – Architects AECOM - Environmental engineering, MEP Whitby Wood – Structures Locality – Community Engagement
Asset type	Residential
Where is the project in the asset lifecycle?	Design Planning approval pending (March 2022)
Completion date	Unknown

Project overview

Larkhall Park involves the creation of 127 new homes (flats and townhouses) and flexible community and commercial space. The project stemmed from significant involvement from local community groups, particularly Friends of Larkhall Park. In 2014, Lambeth Council were forced to cut their maintenance costs for green spaces across the Borough. In response to this crisis, the Friends of Larkhall Park approached the Council to explore whether some underused and neglected council assets could be used to build a community-managed maintenance approach for the park. The project proposes using three council-owned sites adjacent to the park to build high quality, sustainable social housing, and additional community space for local groups.

As part of the planning application, Homes for Lambeth commissioned Buro Happold to produce a social value measurement framework for Larkhall Park.

What makes the project interesting?

- The role Friends of Larkhall Park play in the project, particularly the influence they hold over design decisions and the sustainability strategy.

- A community engagement specialist, Locality, were commissioned to do the 'on the ground' engagement and interact with the local community to ensure the strategy was in line with community needs.

Social value outcomes

As a result of the community engagement carried out by Locality, the following social value outcomes were prioritised for Larkhall Park:

- **Children and Young People**

  To provide a safe, stimulating, and inspiring space for children and young people, through, for example, sports, arts, intergenerational activities, playschemes, early years and pathways into work and enterprise.

- **Climate Challenge**

  To support activities and measures to address the climate challenge, including up-cycling/circular economy, gardening, food growing, library of things and bicycle initiatives.

- **Enterprise and Employment**

  To support local residents into enterprise and work and support remote working including start-up support, managed workspace, business advice, networking, and links to local business opportunities.

- **Health and Wellbeing**

  To promote health and wellbeing amongst local residents, through for example, non-medicalised social prescribing, sports and wellbeing activities, healthy eating, support groups, counselling, and therapy.

An example of the targets set in the social value framework are as follows:

- Encouraging walking / mobility - active stairs/walkway use encouraged through high quality/aesthetically pleasing stairs/walkways — *Targeted*

- Design for future uses such as co-housing, changes for aging population, accessibility, and larger dwellings of multi-generational living — *Targeted*

- Identify any post-Covid concerns, such as a greater transition to working from home — *Targeted*

Social value delivery approach

Buro Happold have developed a social value framework containing qualitative and quantitative KPI's. To develop the framework Buro Happold:

Steps
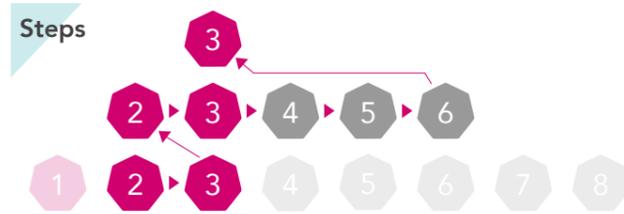
Step 2 (internal stakeholders)

- Identified internal stakeholders such as Homes for Lambeth and the Friends of Larkhall Park.

Step 3

- Conducted a Local Needs Analysis using local reports and national and regional data sets (Step 3). The Needs Analysis focused on the following five topics:

  - Historical context
  - Geographic context
  - Local and regional urban policy, regulation, and ambition
  - Economic profiling of the area (employment and economic activity, economic sectors, household income and housing affordability)
  - Social profiling of the area (demographics, housing type and tenure, social infrastructure, and community facilities). The key objective of this exercise was to map out other assets and initiatives surrounding Larkhall Park that already provide social value to the local community.

Step 2 (external stakeholders)

- Revisited the initial list of stakeholders and updated it to include external stakeholders whose needs were prioritised during the Local Needs Analysis.

Step 4

- Held an internal design team charrette, where the design team and client were presented with the results of the Local Needs Analysis and given the agency to express their opinion on what doing the 'right thing' for the project looked like.

Steps 5 and 6

- The results of the design charrette were translated into a set of KPI's and a tracker that was agreed to by the client and allowed the design team to feedback how they thought the design was responding to the social value framework ahead of planning.

Step 3

- Locality were then hired to carry out community engagement with the previously identified local groups to confirm local stakeholder best interests and opinions, allowing Buro Happold to validate alignment with the social value strategy KPI's and desired outcomes.

Future considerations

The measurement framework is set up to track social value delivery through design and construction. The design team and client will review the targets at each design stage and identify any challenges and opportunities going forward. As this scheme will remain within the ownership of the client, social value creation strategies will be carried forward post completion into management practices, particularly with regards to the local park and the community space.

Yorkhill |

Project location	Glasgow
Project partners	NHS Greater Glasgow and Clyde – Client Scottish Futures Trust Michael Laird Associates – Masterplan JLL - Consultant AECOM – Consultant
Asset type	Mixed use
Where is the project in the asset lifecycle?	Design
Completion date	Unknown

Project overview

Since the opening of the Queen Elizabeth University Hospital in June 2015 several NHS properties across Glasgow have been declared operationally redundant. The resulting consolidation of NHS facilities will result in Yorkhill Hospital, the former home of the Queen Mother's Maternity Hospital and the Royal Hospital for Sick Children being permanently closed.

The impending closure of Yorkhill, and its prime location by the River Clyde, has seen it become a prime candidate for development. The initial development proposal produced Michael Laird Associates (with support from AECOM and JLL) promotes a mixed-use development masterplan incorporating the following:

- Significant amounts of new public realm that will be linked to the existing context and site surroundings and will provide a distinctive and active pedestrian environment that will encourage social interaction and local spending within the masterplan area.

- A series of new and engaging pedestrian accesses through the site making valuable connections to the North, East, South, and West.

- New commercial frontages along Old Dumbarton Road with a suitable scale to ensure a vibrant new street edge is created.

To inform the masterplan, JLL developed a toolkit that will be used to assess and report the socio-economic value of proposed development options against the project's priority social value outcomes.

What makes the project interesting?

- The bespoke socio-economic toolkit helped to focus the design process.

- The potential socio-economic contributions of Yorkhill are being discussed alongside more traditional economic contributions such as construction value.

Social value outcomes

The toolkit focuses on the following socio-economic outcomes:

- Employment
- Education
- Green space
- Gross Value Added
- Accessibility
- Safety

Social value delivery approach

Steps

① ② ▶ ③ ④ ⑤ ▶ ⑥ ⑦ ⑧

Step 2

- Prior to commencing work on the toolkit, Scottish Futures Trust had entered into early stakeholder engagement and a review of local, regional, and national strategy.

The information gathered during early engagement and the results of the strategy review were used to develop a draft list of potential socio-economic outcomes for the site (Step 4). The list of socio-economic outcomes was then used to create the toolkit.

To develop the toolkit:

Step 3

- Data for the Anderston/City/Yorkhill ward (Ward 10) was used. Where this was not available, data for Glasgow City has been used. When ward or Glasgow-specific data was not available, Scottish averages were used.

- A hierarchy of data was established to ensure the toolkit is robust. Data from Scottish Government and the National Records of Scotland (NRS) and contracted sources (such as ScotCen) were first-choice data sources followed by other official sources, such as the ONS, and third-party research from credible sources such as The Red Cross and the Trussell Trust. As much as possible, data from recent years was used.

- As often as possible, the toolkit compares data from Glasgow to that of the Scottish average, or that of a UK or Great Britain average.

- To spot trends and track progress, data was plotted over time.

Step 6

- Based on the data, recommendations were made on the changes that can be made to the existing Yorkhill masterplan, as well as the construction, detailed design, and operation of the completed project.

- A bespoke report on the socio-economic context of Yorkhill with a full explanation of the socio-economic contributions and how they apply to the site and local communities was presented.

Future considerations

The Yorkhill masterplan is currently awaiting approval. However, prior to the final approval and implementation of the masterplan a solution to the relocation of the residual clinical services remaining on site needs to be determined. This revaluation of clinical services will be considered in terms of the initial outcomes derived from the toolkit and will support the evolution of the masterplan.

Department for Transport – Floodwater Management Grant

Project location	Clun – Southwest Shropshire
Project partners	Shropshire Council – Client Kier – Contractor WSP – Designer
Asset type	Infrastructure
Completion date	2023

Project overview

The town of Clun frequently experiences flooding incidents which adversely impact the local community. In response, Shropshire Council have been allocated funds from the Department for Transport (DfT) to develop a flood alleviation scheme in Clun in collaboration with WSP and Kier. A comprehensive data collection and initial project scoping phase has already taken place, with a technical note on the scheme delivered in July 2021.

WSP recognise that delivering social value would significantly benefit the Clun community and are keen to go beyond the technical expertise of designing drainage infrastructure to build a legacy for years to come, acting as a catalyst for long-term change. They would like to implement

a 'soft' engineering approach given the local areas focus on conservation. WSP are keen to focus on reinstatement of existing historical ponds, using natural flood management and techniques to 'slow the flow', as opposed to building new infrastructure. This could include using existing systems such as ponds and wetlands, as well as reintroducing improved water concentrations and quality to support the presence of freshwater pearl mussels. Through reinstating and improving historical river elements to help flood management, the team also hope to improve the natural beauty of the area, provide a tourism hub, footpaths for recreation and the use of modern engineering techniques - all which could be shared with the local community.

What makes the project interesting?

- The project stands out due to the strong working relationship and partnership between WSP, Kier and Shropshire Council.
- The project has included social value considerations from the initial bid stage.
- Shropshire Council already have a range of locally run initiatives in place that the project team will be able to build upon.
- The ongoing relationship between WSP and Shropshire Council will ensure that the social value initiatives are continued through the operational phase of the scheme with strong existing community ties and stakeholder engagement assisting with ongoing monitoring and reporting of social value outcomes.

Social value outcomes

WSP are currently in the process of defining the projects priority social value outcomes. A social value tracker has been set up to record ideas and stakeholder engagement has begun with local groups.

Idea	Description
Science, Technology, Engineering, the Arts and Maths (STEAM) Engagement	STEAM engagement with local schools/universities/education facilities. Example initiatives include John Muir Award, YHA Clun Mill Vertical Vortex Turbine. Aim to improve skills and employability.
Electric Vehicle (EV) Charging Points	Potential for EV charging points in Clun Town that are powered by hydroelectric turbine on the reinstated Mill Race (e.g., Clun identified as a strategic location for journeys returning from Wales).
New Heritage Trail/Bridlepath/Footpath/Circular Walk	Potential for new route along reinstated Mill Race, publicising existing historical/heritage assets in Clun and the surrounding area.
Restoration of Clun Pool	The pool could deliver social, economic and environment benefits to the local area (e.g., National Crucian Conservation Project, pond dipping)
Tourism	Boost in tourism and resultant economic growth following ideas above.
Project involvement for small and medium-sized enterprises (SMEs)	Support local economic growth by procuring SMEs to contribute to scheme design and increase local people in employment.
Property Flood Resilience (PFR) measures for homes and businesses	Engagement with the community about the different types of PFR products available. Associated with ongoing Shropshire Council PFR framework.

Extract from the Social Value Tracker

Social value delivery approach

Steps

Step 1

- Social value considerations were included from the initial project bid stage.

Step 2

- Priority stakeholders were identified in collaboration with the Council during the early stages of the project.

Step 6

- WSP recommends the National TOMs framework to all their project teams (unless another framework is deemed more suitable). As a result, the TOMs framework has been selected for this project. The measurement approach has been approved by Shropshire Council.

Step 3

- WSP held a 'think tank' workshop with multiple stakeholders including Shropshire Council and the Town Council. This session was used to brainstorm ideas for potential social value initiatives to meet the needs identified and develop the social value tracker.

- WSP have engaged with local stakeholder groups, charities, and schools to understand local needs and to gather ideas for potential social value initiatives.

Step 8

- They have also identified local groups and individuals who are keen to help with the upkeep and monitoring of the final scheme.

Future considerations

- Review key deliverables with Shropshire Council and assign these to social value champions who can implement and track progress.

- Use the social value ideas tracker to map out relevant contacts for each initiative.

- Develop a long-term plan with the Strategic Clun Liaison group to work alongside the community, the Council, landowners, and other stakeholders to report on progress and track opportunities.

- Carry out another public consultation exercise during Spring 2022 to further communicate, evaluate and test their Social Value Delivery Plan.

Greening Swinton Square |

Project location	Swinton, Salford, Greater Manchester
Project partners	Avison Young, Groundwork Greater Manchester and IGNITION partners (12 public private and NGO partners brought together through the EU's Urban Innovation Actions initiative)
Asset type	Shopping centre
Where is the project in the asset lifecycle?	Design
Completion date	March 2022

Project overview

Strategic real estate advisor Avison Young, and local charity Groundwork Greater Manchester, with support from the IGNITION partnership, are undertaking an exciting pilot project throughout 2021/22 named 'Greening Swinton Square'.

Swinton Square is an established retail asset in Salford, Greater Manchester, which has been used by the community for over 45 years and currently comprises a range of retail, leisure and residential units. The Greening Swinton Square project aims to demonstrate how nature-based solutions (NBS) can be an integral part of the design of town centres. By delivering 'more than just greening' NBS can contribute to climate and nature outcomes, whilst also improving the vibrancy of town centres. As part of the wider IGNITON project, Greening Swinton Square is

an example of how the city region can increase its resilience to the impacts of climate change by working with a range of landowners and communities. Engagement with Salford City Council has ensured that this project fits in with wider plans for the regeneration of Swinton town centre and it could form a model for other town centres across the city.

To date, Greening Swinton Square has engaged various community stakeholders on the topic of NBS; what they are, how they can be used and the benefits they can bring. Following a series of engagement activities, Groundwork and Avison Young have started to work with residents, business owners and shopping centre visitors to co-design several NBS, such as living walls, green roofs, and rain gardens, which will be installed by the Groundwork team in spring 2022.

The Greening Swinton Square team have undertaken a creative engagement approach to establish the projects baseline, agree social value outcomes and develop the NBS design solutions, these include:

- The creation of an on-site community hub in an empty retail unit. The hub has been home to interactive demonstrations of living walls, rain gardens and green roofs, allowing visitors to see, touch and feel these concepts and gain a much better understanding of NBS.

- Interactive on-site events to understand community wants, needs and preferences.

- Observations using MOHAWk tool[5] (Method for Observing pHysical Activity and Well-being) to record how people are using the space now.

Installation of the NBS is expected in March 2022, beyond this Avison Young and Groundwork Greater Manchester have committed to monitor the NBS, exploring the benefits and impact they have, as well as ensuring their ongoing maintenance.

What makes the project interesting?

- Greening Swinton Square seeks to demonstrate the tangible benefits of investing in NBS beyond the immediate environmental and wellbeing benefits; exploring improved building performance and economic value to inform the investment case

- The partnership between Groundwork, as a local charity, Avison Young, as a commercial real estate manager, and wider Ignition public sector partners, has allowed us to build a trusted relationship with stakeholders, gain in depth local knowledge and ensure a better understanding of stakeholder interests and what matters to each stakeholder group

Social value outcomes

Health, Wellbeing and the Environment

- Reduces pollution and street noise
- Better management of surface flooding
- Vital habitats and resources for a variety of local wildlife
- Potentially improved building performance through natural cooling
- Increased access to green space enhancing the health and wellbeing of the local community

Strength of Community

- Creates more opportunities to connect with, and learn about, nature.
- A more attractive and vibrant local centre, which retains existing and attracts new users.

Jobs and Economic Growth

- Potentially reduces centre costs through natural temperature control of buildings and management of surface water flows
- Provides an opportunity for an SME and registered charity, Groundwork Greater Manchester, to build expertise and utilise learning around NBS, to replicate in other places and settings, including community spaces
- Builds an investment case for green infrastructure, including NBS, within plans for local and district centres by demonstrating multiple benefits to a range of stakeholder

Social value delivery approach

The project used an iterative approach, re-visiting some of the steps of the process multiple times, making refinements based on stakeholder engagement.

Steps
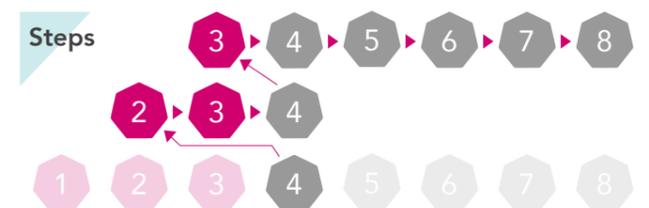
Future considerations

Once the full baseline data is in place, Avison Young will work with Groundwork Greater Manchester to develop a Social Value Measurement Framework and plan for ongoing monitoring and reporting.

[5] https://www.tandfonline.com/doi/full/10.1080/23748834.2020.1775383

Langarth Garden Village |

Project location	Langarth, Cornwall
Project partners	Cornwall County Council – Master developer Arcadis – Consultant
Asset type	Garden village
Where is the project in the asset lifecycle?	Design
Completion date	2038

Project overview

Langarth Garden Village will provide a new, sustainable community for between 8,000 and 10,000 residents in Cornwall. Langarth will provide a mix of housing sizes, types, and tenures to meet local need. It will also include new schools, health, cultural, faith, leisure, and community facilities. Pedestrian and cycle links into Threemilestone and the surrounding communities will be created and enhanced, with new areas of forest, parks, parks, public sport areas and green amenity spaces. Innovative and flexible workspaces will also be provided.

Over thirty organisations fed into the planning design work, fifteen of which are from Cornwall and contributed local knowledge and expertise.

Arcadis leads the Portfolio Management Office (PMO) that oversees the management of all the programmes which feed into delivery of Langarth Garden Village including social infrastructure (led by Arcadis), integrated transport (led by Cornwall Council/Cormac) and technical infrastructure (led by Arcadis). The masterplan was developed by AHR with close support from Atlantic Arc Planning.

What makes the project interesting?

- The project is aiming to create a community that is connected to the local area, whilst maintaining a proper village centre. Each centre hopes to attract local businesses that will be accessible to residents by walking or cycling.

- There will be a community farm, allotments, edible streets, and several mobility hubs which will all contribute towards a sense of community.

- The scheme will improve walking and cycling networks into Truro which will have a major benefit for Cornwall and encourage more people to choose to walk and cycle their commutes.

- A new stewardship model will enable local ownership of the new community and allow the benefits of Langarth to be realised into the future.

- There is a huge apprenticeship focus with apprentices working at the heart of the scheme providing career opportunities for those wanting to live and work in Cornwall.

Social value outcomes

Ten design principles have been agreed by Cornwall Council and the Masterplanning project team at Arcadis:

- Work with and enhance the quality of life for existing communities.
- Make it easy and possible to get around on foot, bike, and public transport, both within Langarth Garden Village and the surrounding communities.
- Help instil a strong sense of community.
- Create a place that builds upon and celebrates this unique environment.
- Create a hard-working landscape that not just looks beautiful but is productive and functional.
- Promote healthy and active lifestyles and a sense of wellbeing.
- Design for climate change resilience.
- Offer a mix of homes meeting the varying needs of residents.
- Create jobs and enhancing existing employment opportunities.

Social value delivery approach

Steps

1 → 2 → 3 → 4   5   6   7   8

Step 1

- Cornwall Council have a strong social value purpose and as a result, social value has been at the heart of the plans for the Langarth Village site from the beginning.

Step 2

- A Langarth Stakeholder panel with representatives from a priority stakeholder groups. The stakeholder panel met once a month during the development of the masterplan.

Steps 3 and 4

- 10 design principles were agreed based on suggestions from the Langarth Stakeholder Panel
- These design principles were then incorporated into the masterplan

Future considerations

Langarth Garden Village obtained planning approval in December 2021 with no objections.

White Collar Factory |

Project location	Islington, London
Project partners	Derwent London – Developer JLL – Consultant Envoy Partnership – Social value measurement
Asset type	Office
Where is the project in the asset lifecycle?	In use

Project overview

White Collar Factory is an award-winning redevelopment of a major corner site on the Silicon Roundabout in the heart of the London's Tech City. Construction was completed in 2017 and includes a new 16-storey 237,000 square foot office tower and low-rise campus buildings containing offices, retail, housing, and a new public square.

Derwent London commissioned JLL to evaluate the socio-economic impact of White Collar Factory to understand the net impact (positive or negative) that the building has had on the local area and community.

What makes the project interesting?

- White Collar Factory is based in the London Borough of Islington, a borough with some areas of high deprivation (53rd most deprived borough in England). Local data demonstrated that there was a clear local need and an opportunity to have a positive social impact.

- The project features several unique health and wellbeing initiatives including a running track.

- JLL have committed to carrying out socio-economic impact assessments on all major projects once occupied. White Collar Factory was the first project where JLL investigated not only the development's impact upon local stakeholders, but also measured occupier wellbeing. Also new to the assessment were insights from the alternative field of neuroscience.

Social value outcomes

Derwent London agreed four priority social value outcomes for the scheme:

- Support local prosperity

- Create employment and training opportunities for local people

- Have a positive impact on the wellbeing of tenants and the local community

- Create net positive impact on the community

Social value delivery approach

JLL sought to understand the impact of White Collar Factory from the perspective of the stakeholders who experienced a significant change (positive or negative) as a result of the project. Identifying what changed for priority stakeholders helped JLL to move beyond traditional impact assessments that rely on output measures (e.g., number of workers) towards an assessment that focusses on outcome measures (e.g., improved quality of life scores or improved sense of place).

The socio-economic impact assessment focused on what value (if any) value the project has for the immediate neighbourhood and local stakeholders.

Steps

1 2 3 4 5 6 7 8

Step 2

- JLL began by brainstorming all potential stakeholders. For a full list of stakeholders considered please consult Guidance Note 2.

- Priority stakeholders were then determined using a stakeholder prioritisation exercise to assess the influence each stakeholder has over the building (e.g., the extent to which they can influence the continued operation of the building) and the extent the building has an impact on them (e.g., livelihood or delivery of services). This exercise used a scale of 1 to 5 to provide a score.

Step 6

- With priority stakeholders established, Envoy Partnership supported JLL to conduct an urban design and impact analysis to assess the buildings fit and sensitivity to the urban fabric of the local neighbourhood. This was complimented by qualitative interviews and surveys with residents, workers, and local businesses.

Future considerations

Plans include projects that continue to build on the site's integration to the local area and that bring businesses and local communities together, for example work experience and employment opportunities to showcase the sectors and companies that call this area home.

Opportunity Placement |

Project location	London
Project partners	Rebelleon Rise Futures Re_threads
Asset type	N/A
Where is the project in the asset lifecycle?	N/A

Project overview

Rise Futures is a charity that works with Rebelleon and Re_threads, connecting vulnerable young people with education, employment, and training opportunities, to prevent them from suffering further abuse, exploitation, and discrimination.

This approach to social value delivery differs from a conventional project approach. Industry convention typically begins with a project, and the project team looks at how to deliver social value in the local area. The Rise Futures approach focusses on an individual and considers whether there are any project opportunities happening locally that the individual may benefit from. The Opportunity Placement programme is a 16-week placement for Looked After Children (LAC) who are also NEET (Not in Education, Employment or Training). It aims to give young people an opportunity to gain skills and confidence, empowering young people to achieve newfound success. Engaging in Opportunity Placement hopes to bring social change in deprived Boroughs in London.

What makes the project interesting?

Rise Futures and Rebelleon have taken an innovative approach to social value delivery in the built environment. By focussing on the needs of LAC and connecting them with built environment projects, the programme shows how you can proactively deliver social change in a community. Rebelleon have taken an approach common in the third sector approach and embedded it into their working model.

Social value outcomes

The programme aims to:

- Improve skills for disadvantaged young people
- Develop accessible opportunities for disadvantaged people
- Improved employability outcomes of vulnerable young people
- Develop social innovation to create local skills and employment
- Reduce employment bias
- Improve wellbeing of vulnerable young people

The outcomes for the individual could be:

- Development of soft workplace skills
- Understanding of their workplace strengths.
- Understanding of their value, and the experience of their achievements being celebrated
- Belief, awareness, and motivation to gain employment.
- Reduce employment bias
- Improve wellbeing of vulnerable young people

Social value delivery approach

Steps

① ② ▶ ③ ▶ ④ ⑤ ⑥ ⑦ ⑧

Step 2

- Individuals who meet the criteria for the programme are identified and approached.
- Rise Futures works with host organisations prior to the young person's arrival, this planning process is crucial to the Opportunity Placements success. Planning allows Rise Futures to support the organisation with the preparation prior to the young person starting, it also allows the organisation to identify what training is required and where a young person will develop and grow in their business.

Steps 3 and 4

- On arrival with Rise Futures, the young person engages in an intervention process which allows the Rise Mentor and young person to identify and understand the young person's aspirations. These aspirations are then used to shape the Opportunity Placement offered.
- Throughout the Opportunity Placement feedback from the young person is used to adjust the placement as the young person's aspirations develop.

Acknowledgements |

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Questions & Feedback

This guidance aims to enable the delivery of social value on built environment projects. We welcome input from any interested stakeholders on the content.

If you have any questions on the guidance or would like to provide feedback, please email….