

A GUIDE FOR DESIGN TEAMS

# Maximising social value in design

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# Executive summary

In June 2019, the Royal Institute of British Architects ([RIBA](#)) joined the global declaration of an environmental and climate emergency and to provide RIBA members with the tools needed to strengthen their position as sustainable leaders of the built environment. RIBA released a guide of [RIBA Sustainable Outcomes](#) which outlined Sustainable Communities and social value as one of the eight core themes.

Social value is a measure of the additional benefits that an organisation and its supply chain can bring to society. It is defined within the [Public Services \(Social Value\) Act 2012](#) (the Act) as the 'economic, social and environmental wellbeing' that is created by a service (or development) and is delivered as both direct and indirect outcomes or additional benefits to society arising from an intervention over time. In January 2021, Central Government updated their guidance<sup>1</sup> to the Act by requiring all major procurements not only consider but explicitly evaluate social value with a minimum weighting of 10%. This requirement was also included within the [Construction Playbook](#)<sup>2</sup> which is supporting a number of leading councils now looking to embed social value into their planning processes.

In real estate and the built environment, leading councils, developers and investors alike are looking at how they can do more for the local communities where they operate. Design and project teams are hugely important to ensure social value is embedded in a project from the outset. As the 'social value movement' spreads across the built environment sector, the [Social Value in Design Taskforce](#)<sup>3</sup> (the Taskforce) was set up to address the challenges that design teams face when looking to bring social value into a project. The Taskforce comprises many organisations from across the sector including designers, architects, transport planners, engineers, sustainability consultants and other built environment professionals.

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<sup>1</sup> [Procurement Policy Note PPN 06/20 – Taking Account of social value in the Award of Central Government Contracts](#)

<sup>2</sup> Construction Playbook explicitly mentions social value and requires it to be assessed during the procurement of new public buildings

<sup>3</sup> Social Value in Design Taskforce was set up in March 2021

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## Key challenges highlighted by the Taskforce

- » Lack of enough buy-in from clients with respect to social value
- » A lack of relevance of social value requirements to small scale design teams and firms in procurement and contract management (particularly with the public sector)
- » A lack of industry-wide best practice to use as a common reference point
- » A lack of clarity on how to quantify the social value created and who is responsible for its integration into a design project
- » The perception that including social value into design will add more cost

The Taskforce has focused on two key workstreams to respond to the challenges above: 'The How' and 'The What'.

'The How' focuses on how social value can be curated at each stage of a project's lifecycle and how design teams can deliver social value within their project teams.

'The What' is all about what design decisions allow for end users or wider community members outside a design team to continue creating a legacy of social value. Key innovations that the Taskforce delivered within these two workstreams include, the Social Value Plan of Work. This describes how social value should be implemented into each stage of the RIBA Plan of Work and the Design for Social Value Checklist which was developed to establish an industry baseline of best practice tied to relevant case studies.

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## Our response

### The How

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**The Challenge** Not enough buy-in from clients/ relevance of contract management requirements

**The Question** How can social value be integrated at each stage of a project's lifecycle? How can a design team deliver social value with their project teams?

**The Output** The Social Value Plan of Work and Design Team Social Value Action Plans

### The What

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**The Challenge** Lack of an industry standard of best practice

**The Question** What design decisions allow for other end-users or wider community members outside a design team to continue creating a legacy of social value?

**The Output** The Design for Social Value Checklist

## Post COVID-19 A new 'social contract'?

The COVID-19 pandemic has hit our communities hard with job losses, failed businesses, the closure of schools and the dramatic slowdown of the economy. Local authorities have also been badly impacted.

We are seeing the emergence of a new 'social contract' that expects businesses which gain from society to also give something (more) back at the same time. This is already the case in public sector procurement which has seen the requirement for social value to be a part of the supplier relationship and gain in importance rather than diminish.

This expectation is likely to flow over into the design and planning process where design teams, developers, contractors and their suppliers will be expected to provide even more tangible local benefits that make a real difference to the communities where they are working.

This document aims to empower and equip project management and design teams with the tools they need to create social value through their decisions around material choice, sustainable technology, needs-based design, accessible public realm and wellbeing-focused places. Generating social value from the outset of a design project helps build trust with local communities. More importantly, it impacts how a building or place can continue to add value for local people throughout its lifetime.

Building regulations need to reflect the shift that built environment professionals, as leaders of sustainable design teams, are undergoing to combat climate change and meet the UK climate targets and their other ethical responsibilities. However, findings from the Taskforce show that most built environment experts striving for social value creation beyond the minimum requirements face many barriers and that more support and good practice guidance is required to maximise these opportunities. This guidance document does not seek to replace any existing design toolkits or frameworks focused on creating social value in architectural or built environment design, rather it provides access to additional good practice and guidance for design teams seeking to gain an understanding of social value in relation to design processes and how it can be embedded at different stages and scales.

If social value is embedded effectively in the design process, not only will project teams build trust with communities from the outset but all delivery partners will benefit.

**“Planning should take account of, and support, local strategies to improve health, social and cultural wellbeing for all.” – National Planning Policy Framework**

Construction partners can engage in more sustainable practices along with supporting the local economy as discussed in the RIBA Social Value Toolkit for Architecture, occupiers will benefit from an increasing local skills base, a more vibrant economy, and, ultimately, improved wellbeing<sup>4</sup> asset owners will benefit from an increased asset value over the long term.

Ultimately, the local community should always be the key beneficiary from any initiative, gaining from more jobs, receiving support with training, accessing healthier places to live and work, and receiving community investment. By placing social value at the core of our COVID-19 recovery agendas, these outcomes can directly address issues caused by COVID-19, so we can build back better, enhancing the resilience of local communities for generations to come through the spaces we create and how we create them.

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<sup>4</sup> [RIBA UoR Social Value Toolkit](#)

# 1. Introduction to social value and The Social Value in Design Taskforce

To embed social value in the design process, it is first important to understand the existing policy and legislative context around social value in the UK.

The [Public Services \(Social Value\) Act 2012](#) has transformed the relationship between the public and private sector by placing social value at the centre of procurement decision making, a change that was given a considerable boost with the publication of [Policy Procurement Note PPN06/20](#) and the [Construction Playbook](#).<sup>5</sup> These added further weight to the Act by requiring all major procurements, including new capital projects, to explicitly evaluate social value as a part of their award criteria. Similarly, the [Procurement Reform Act 2014](#)<sup>6</sup> and the [Wellbeing of Future Generations Act \(Wales\) 2015](#) in Wales require public bodies to consider the long-term impact of their procurement and operational decisions on the social, environmental and economic wellbeing of communities. These new requirements have inevitably impacted all those wishing to work with the public sector, including professional services, as they have needed to submit their social value proposals as a part of the tender process.

The National Planning Policy Framework (NPPF) and the [Planning Policy Wales \(PPW\)](#) affirm that the purpose of the planning system is to contribute to sustainable development and ensure that this filters down to local authorities by setting out the three core dimensions of sustainable development which are social, economic and environmental. The overriding success of the Social Value Act has led many planners and, more recently, private sector developers to look at how this success can be replicated across new developments, including embedding social value into the planning process.<sup>7</sup> As a result, embedding social value into the planning system has become a growing movement as leading councils, such as Islington and Salford, look to apply specific policies in their Local Plans that embed social value requirements across major developments. The [‘Embedding Social Value in Planning Taskforce’](#) was formed at the end of 2020 to push this agenda even further and contributors included



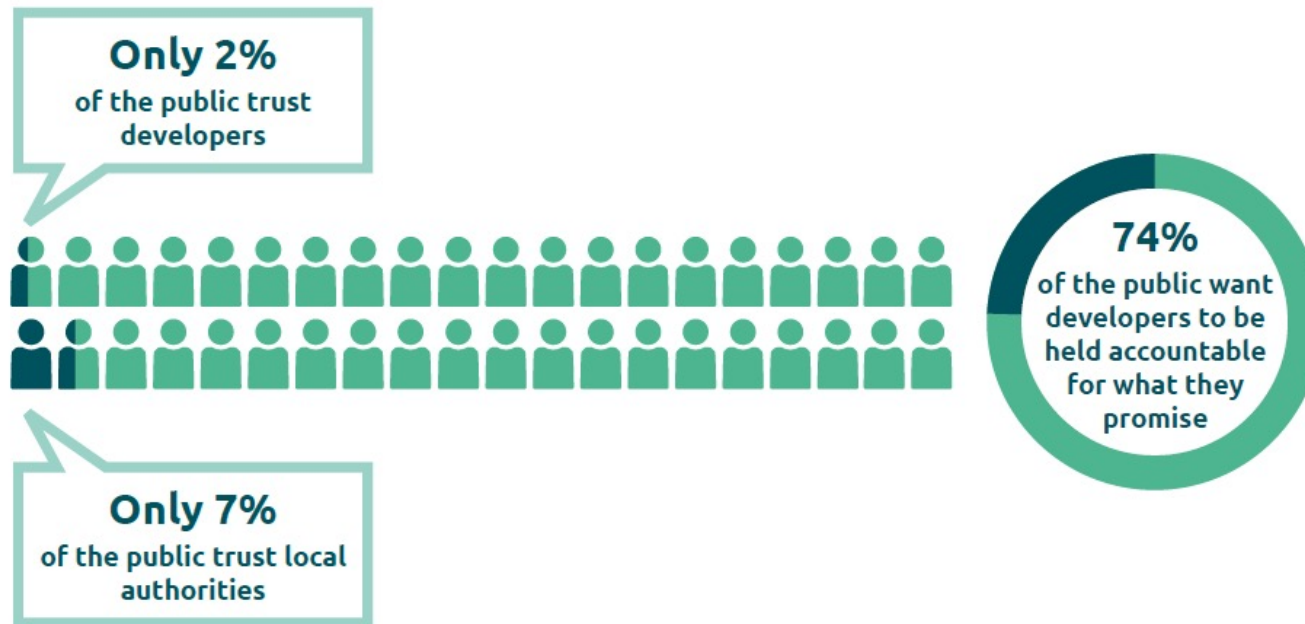
Look out for the lightbulb to see innovative examples of Inspired Design shared by the Taskforce

<sup>5</sup> Construction Playbook explicitly mentions social value and requires it to be assessed during the procurement of new public buildings

<sup>6</sup> [Procurement Reform \(Scotland\) Act 2014: statutory guidance](#)

<sup>7</sup> A recent publication shows how social value can be embedded into the planning process: [Embedding social value into planning - Social Value Portal](#)

**Figure 1:** The state of trust in the planning system



professionals from the Royal Town Planning Institute, local authorities, planning lawyers, developers, consultants and the Greater London Authority. The Planning Taskforce found that there was no impediment to embedding social value in to planning either through a Local Plan or by linking up statutory legislation with existing council policies to provide the council with the ability to request a [Social Value Statement](#) from developers as part of the planning application. Furthermore, for this information to be taken into account as a part of the legitimate planning process. The Planning Taskforce recommended that a Social Value Statement should be included with all major planning applications as it would be transformative in demonstrating a developer's understanding of local needs and commitment to addressing these through measurable social value outcomes.

But the drivers for embedding social value into development go beyond legislation. A recent study by Grosvenor<sup>8</sup> in 2019 found that only 7% of the public trust local authorities to look after their interests concerning new development and that even less (2%) trust developers. If faith in our planning and development system is to be restored, then some major changes will need to be made, and social value offers an opportunity

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<sup>8</sup> [Building trust](#) (Grosvenor Britain & Ireland, 2019)

to rebuild trust, underpinned by transparency and constructive engagement.

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## The Social Value in Design Taskforce

In response to the changing legislative context, practitioners involved in design and development find themselves at the forefront of new expectations and opportunities. The Taskforce was brought together to understand the challenges practitioners face integrating social value into their decision-making and how they can also maximise social value through their project teams. This guidance document aims to share the Taskforce findings and support other design teams and professionals to empower the communities who use the spaces they design.

The [Social Value in Design Taskforce](#) comprises over 40 design professionals from several organisations across the built environment sector, including architects, urban designers, transport planners, design engineering consultants and researchers who collaborated on this guidance document.

The Social Value in Design Taskforce has been focusing on multiple deliverables to address:

### 1. The How: Social Value Plan of Work

Discussed how the RIBA Plan of Work stages and legal planning requirements can be used by design teams, clients, contractors and local authorities to embed social value in design and ensure that social value outcomes are delivered at each stage of the design process and during the full lifecycle of a building or community space.

### 2. The What: The Social Value Checklist

Reviewed and contributed to our summarised guidance (checklist) of design interventions and decisions that a design team must aim to achieve as a baseline to drive others to create social value. The Taskforce ensured fundamental interventions were included and provided case studies of how these interventions have been realised.

**“ESG investing is moving well beyond negative screening and towards finding companies that are truly creating value”** –Mark Carney, Head of ESG and Impact Fund Investing, Brookfield Asset Management



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## Social Value in Design Taskforce

**STRIDE TREGLOWN**

SHEPPARD ROBSON



**BDP.**

**BURO  
FOUR**



**McBains**



**BakerBrown**

Sarah Wigglesworth Architects



**KPF**



## 2. How does real estate create social value?

Research by the British Council of Offices and Legal and General, in their publication '[Measuring Social Value of Offices 2016](#)', indicates that the potential contribution that a building can make to society is significantly higher where there is a comprehensive Social Value Strategy that covers every stage of the life cycle of that development. For a typical development, the social value delivered over 20 years could be up to four times higher than the original construction costs. This is most effective when social value is considered at the outset of a project. For this reason, design and project teams play a key role in influencing how social value can be embedded at each stage and identifying what needs and opportunities exist locally.

Social value is delivered across the full life cycle of a development, from design and construction through to occupation, including how the property is managed and how the occupiers add value.

**During design** — Design teams are ultimately responsible for developing the plans and infrastructure that can unlock the potential for community activities and value creation. Design teams can also add value through the creation of local jobs and apprenticeships, and by getting involved in community outreach programmes.

**Meanwhile uses** — Meanwhile use often led by the development team can bring an empty site alive and create social value simultaneously. This is especially the case for large masterplans while the site is being developed or awaiting planning permission.

**During construction** — Some social value conditions are captured within a Section 106 agreement, such as requirements for local labour, local spend and apprenticeships. Innovative contractors will do much more than this, including working with partners to provide job opportunities and training for those furthest from the job market, increasing local supply chain spend, digital mentoring and embodied carbon reductions.

**In use: property management** — The property management team can unlock social value through the way in which it procures property services such as security staff and maintenance, repair and cleaning services. The team also has a vital role in bridging the gap between the occupier, the community and the local council to unlock opportunities for the occupiers to employ local people, reach local schools and volunteer in the community.

**In use: occupation** — The occupier has the potential to create the most social value through the way it engages with the local community, provides jobs and training opportunities for local people, provides access to social activities, engages with local supply chains and works to protect the environment.

## 2. How does real estate create social value?

The **key reasons for social value to be embedded into the delivery of new and existing real estate developments** include:

**Community engagement** – provides a vehicle for empowering communities and engaging them proactively in developing solutions and delivering better outcomes that have meaning and ‘matter’

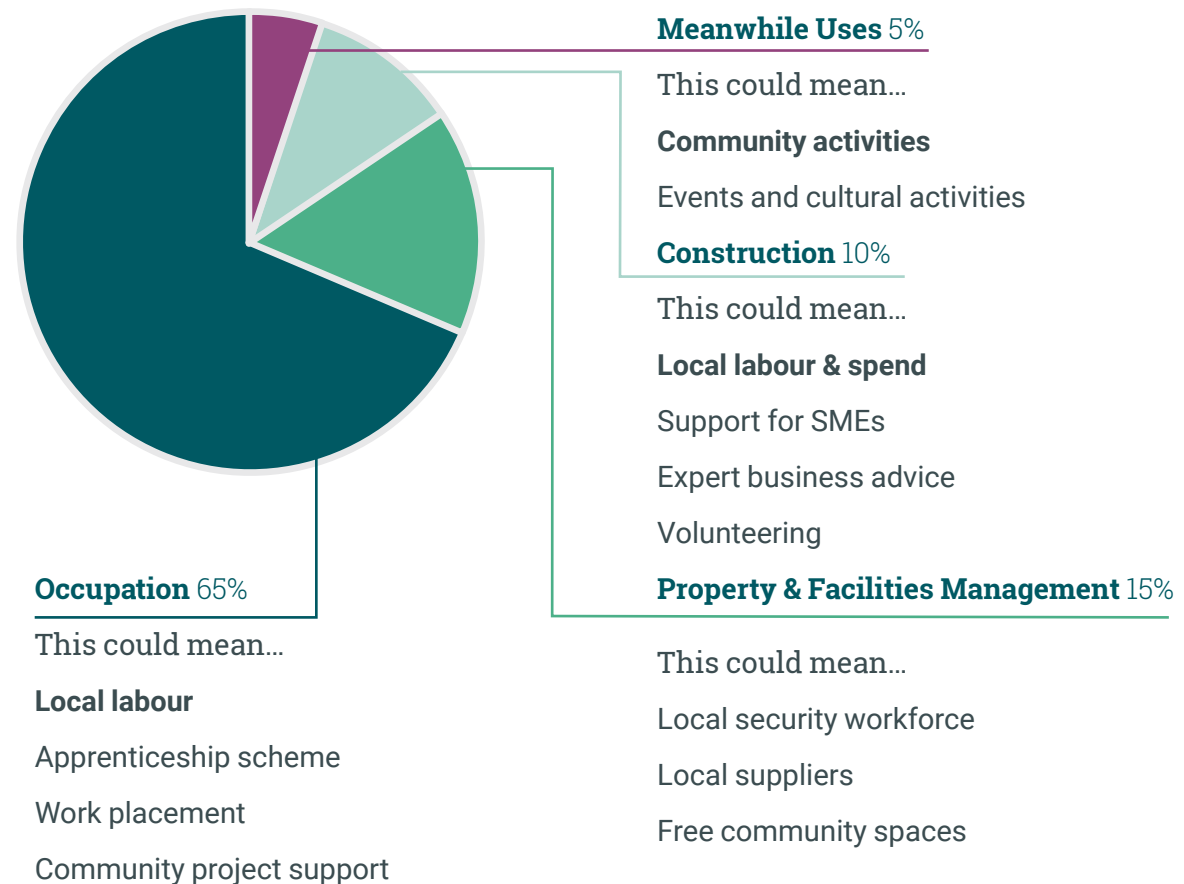
**Societal value** – allows developers to understand and respond to local needs and opportunities and articulate the broader contribution that a new development will bring to society and the immediate area.

**Supply chain engagement** – ensures that there is a focus on not only engaging local suppliers and SMEs but building local capabilities and ensuring that the supply chain is diverse and reflects the cultural mix of the location.

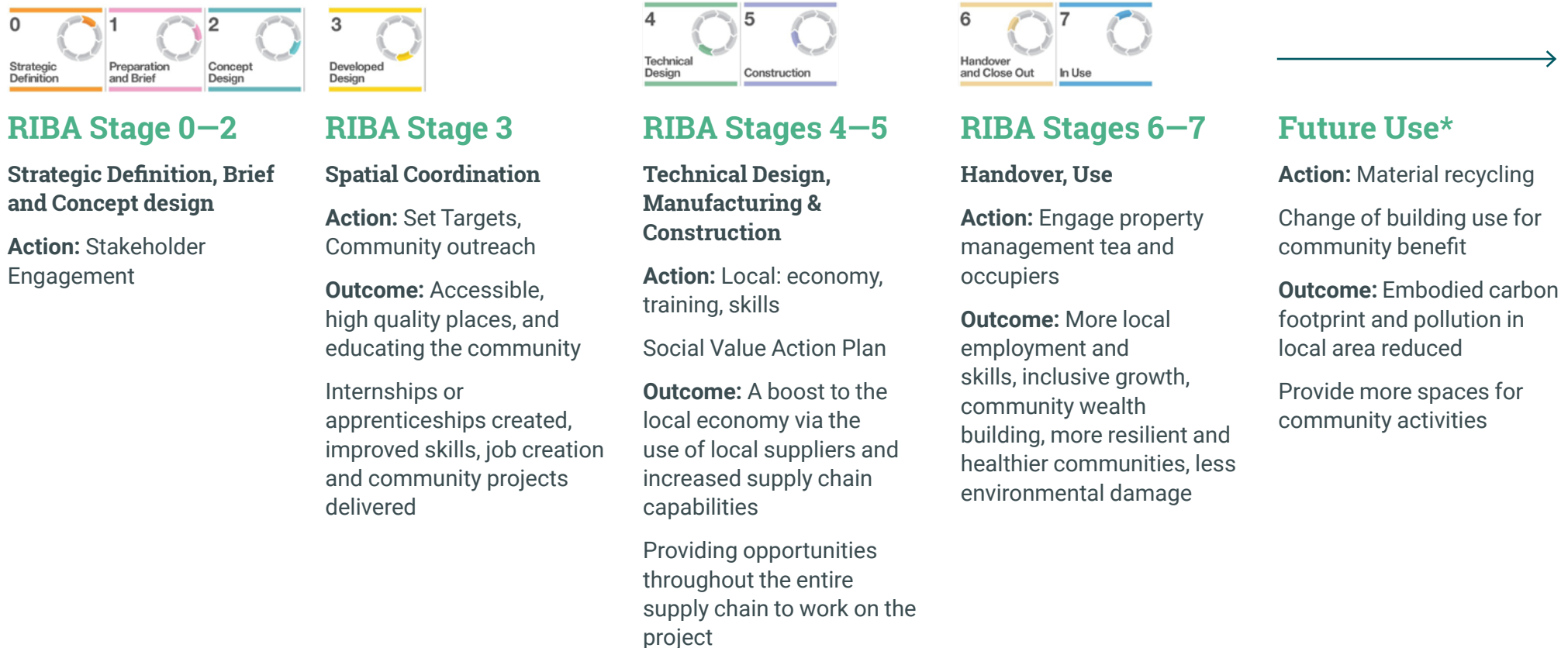
**Social investors** – there is a growing awareness amongst investors of the importance of ensuring that their investments not only make a good return on investment but also have a beneficial impact on society and local communities.

Social value can be delivered at each stage of the RIBA Plan of Work and across the full lifecycle of a building design, from engagement, design and construction to in-use, including property management and occupation.

**Figure 2:** Typical distribution of social value throughout the lifetime of an office building



**Figure 3:** Examples of activities and potential social outcomes from integrating social value into the design process



\*These stages are not part of the RIBA Plan of Work Stages but are vital stages in the development lifecycle where social value can be embedded

# 3. Measuring social value

Measurement is essential in creating an industry standard and common reference point around social value in design and allows design teams, contractors and developers to track performance against their social value targets, set, monitor and drive continuous improvement in social value creation, and be transparent to other communities and stakeholders about the social value commitments they make.

There are two principal social value measurement solutions being adopted by the industry and local authorities which are the National Social Value Measurement Framework, known as the National TOMs, and Social Return on Investment (SROI).<sup>9</sup> SROI is a principles-based methodology for measuring extra-financial value (i.e. environmental and social value not currently reflected in conventional financial accounts) relative to resources invested according to generally accepted Social Accounting Principles.<sup>10</sup>

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## The National TOMs

The National Social Value Measurement Framework, also known as The National TOMs Framework, has become the principal means of measuring and reporting social value across the sector. The framework was first published in 2017 and is endorsed by the [National Social Value Taskforce](#)<sup>11</sup> and the Local Government

Association (LGA). The LGA has also produced an [explanatory video](#) showing how the TOMs are being used by councils across England and Wales.

The framework is built around a series of Themes, Outcomes and Measures (hence the 'TOMs') that allow organisations to measure the social, environmental and economic impact of a development on society based on a series of potential social interventions.

Each activity in a measure is allocated a proxy value that reflects:

- » Value for the individual
- » Value for the government: the fiscal savings to central and local government, for example, in terms of social welfare payments
- » Value for the community: economic benefits to the local community and the value to society of support

The proxy values used in the TOMs allow users to assess the financial impact that any measure will

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<sup>9</sup> [Social Return On Investment \(SROI\) guide](#)

<sup>10</sup> [The Seven Principles of Social Value](#)

<sup>11</sup> [National Social Value Taskforce](#)

### 3. Measuring social value

make, and they are developed from adaptations of benefit analysis techniques as outlined in the Treasury Green Book<sup>12</sup> and other relevant public sector guidelines. It is, of course, recognised that social value is not all about money, but this is an important metric to help understand the scale and breadth of the impact that a measure can make and can help in decision making and proportional comparison to justify an intervention decision.

Many councils across England and Wales<sup>13</sup> have adopted the National TOMs which are built around five key Themes developed with the National Social Value Taskforce, which reflect the main policy and priority areas of the Taskforce.

#### The five TOMs themes

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##### **Jobs: Promote local skills and employment**

To promote growth and development opportunities for all within a community and ensure that they have opportunities to develop new skills and gain meaningful employment.

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##### **Growth: Supporting growth of responsible regional business**

To provide local businesses with the skills to compete and the opportunity to work as part of public sector and big business supply chains.

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##### **Social: Healthier, safer and more resilient communities**

To build stronger and deeper relationships with the voluntary and social enterprise sectors while continuing to engage and empower citizens.

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##### **Environment: Decarbonising and safeguarding our world**

To ensure the places where people live and work are cleaner and greener, to promote sustainable procurement and secure the long-term future of our planet.

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##### **Innovation: Promoting social innovation**

To promote new ideas and find innovative solutions to old problems

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<sup>12</sup> [HM Treasury Green Book](#)

<sup>13</sup> [National TOMS for Wales](#)

## The National TOMs Framework



### Jobs: Promote Local Skills and Employment

More local people in employment

Fair Work

More opportunities for disadvantaged people

Improved skills

Improved skills for disadvantaged people

Improved skills for a low carbon transition

Improved employability of young people



### Growth: Supporting Growth of Responsible Regional Business

More opportunities for local MSMEs and VCSEs

Improving staff wellbeing and mental health

Reducing inequalities

Ethical procurement is promoted

Cyber security risks are reduced

Social value embedded in the supply chain



### Social: Healthier, Safer and more Resilient Communities

Crime is reduced

Creating a healthier community

Vulnerable people are helped to live independently

More working with the community

Our Occupiers are more satisfied



### Environment: Decarbonising and Safeguarding our World

Carbon emissions are reduced

Air pollution is reduced

Safeguarding the natural environment

Resource efficiency and circular economy solutions are promoted

Sustainable procurement is promoted

More buildings are certified



### Innovation: Promoting Social Innovation

Social innovation to create local skills and employment

Social innovation to support responsible business

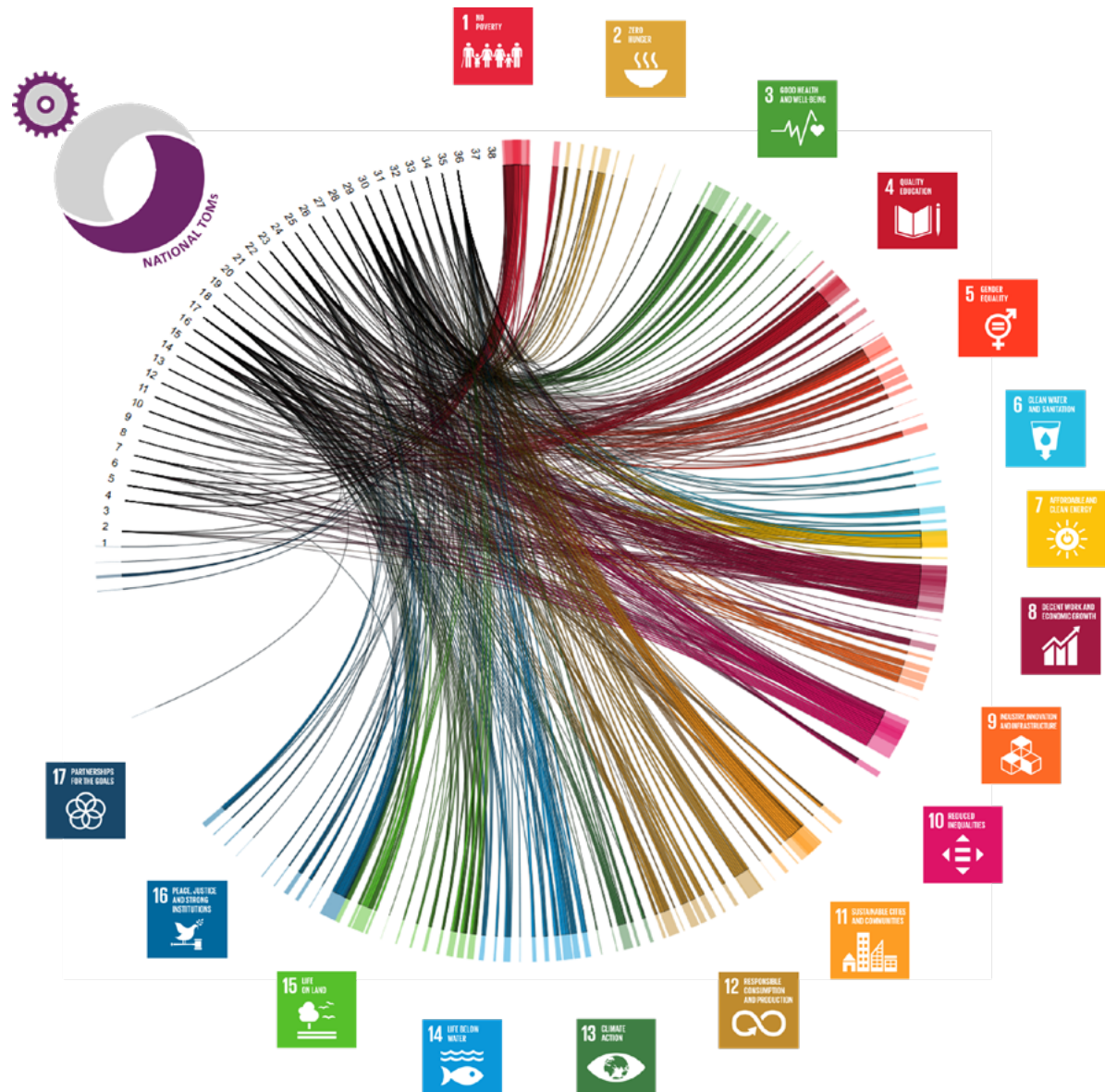
Social innovation to enable healthier safer and more resilient communities

Social innovation to safeguard the environment and respond to the climate emergency

## Mapping the TOMs to the UN SDGs

The universally recognised needs addressed by the TOMs outcomes are relevant across all geographies. There is a clear link in the beneficiaries between the activities and interventions captured in the National TOMs and the UN's Sustainable Development Goals (SCGs). The National TOMs have been mapped to the 169 targets and 230 indicators that sit behind the 17 Goals. Organisations working with Social Value Portal (SVP) to measure their delivery against the National TOMs can report on which Global Goals they are contributing to in both financial and non-financial terms.

Figure 4: UN Sustainable Development Goals Mapped to The National TOMs





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## Place-centred TOMs – Making it local

The National TOMs should only ever be seen as a starting point, and they must be developed to reflect specific local needs and opportunities. This should include identifying key stakeholder groups, desktop research to assess need (e.g. Indices of Multiple Deprivation), and conversations with the community and its representatives to confirm any local opportunities and priorities.

A set of Place-centred TOMs should be designed to reflect the local context and provide an understanding of where the new development can make a real and long-lasting difference. Key steps to developing your Place-Centred TOMs will be as follows:

### Example of a Place-centred TOMs Framework

- » Within this framework, the local needs analysis and community engagement informs the measures included in order to maximise the impact, potential initiatives, interventions and community partners are identified to inform delivery, and finally a targets benchmarking assessment is carried out.

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## Using the National TOMs

The National TOMs or a set of place-centred TOMs can be used across the design and construction cycle as follows:

- » **Target Setting** Used to allow the design team to set their own social value targets and actions.
- » **Social Value Statement** The Place-centred TOMs may be used to describe the activities and targets that will be delivered after planning that run through design team social value, meanwhile uses, construction and through to occupation including workplace and facilities management. Where a development is likely to run over four years, targets should be reset.
- » **Meanwhile Uses** The TOMs may be used to monitor and value any meanwhile uses being delivered on the site. These may be temporary but will help build confidence amongst the local community.
- » **Procurement** The TOMs should be used to engage with the Tier 1 contractors to ensure that their social value offer is relevant and proportional to the needs of the local area. It is important that targets are monitored and that contractors provide a quarterly update on progress including evidence of delivery.

- » **In Use** The TOMs may be used to engage the property managers and the tenants of the new development.

While we acknowledge that the National TOMs may not at the moment comprehensively measure the entire sustainability of a building, we are open to continuing to consult and learn new ways to adapt it following this document and with the help of the Taskforce.

**Figure 5:** Steps to establishing a Place-centered TOMs



**Figure 6:** Place-centred TOMs

**Needs Analysis:**  
The obesity rate in the site area is higher in than the regional average

**Community Engagement response:**  
70% of community engagement respondents would like more access to outdoor space for exercise

**Community Partner:**

- Community fitness charity
- Local organic food market

Place-centred TOMs

Theme	Outcome	Measure	Target
<b>Social:</b> Healthier, Safer & More Resilient Communities	<b>Create healthier communities</b>	Initiatives taken to engage people in health interventions to reduce obesity or wellbeing initiatives in the community including physical activities for adults and children	Green spaces <b>in design</b> dedicated to free regular sports activities and meditation/wellbeing sessions  60 annual <b>project team (staff)</b> hours dedicated to fitness programmes or community food growing initiatives

**£240,000 of added value towards creating healthier communities**

Targets for each design phase are set using

- Industry benchmarks
- SVP benchmarks
- Council priorities

**Figure 7:** How the National TOMs are used during design development



## 4. Designing for social value – The how and the what

It is a commonly held belief that social value is principally the responsibility of the main contractor to deliver through the construction process and Section 106 agreement, and that design teams may discharge their own responsibilities through what they are designing. This is incorrect, and all development team members should take responsibility for delivering social value throughout their appointments through their own targeted community engagement programmes and the quality of their design.

However, it is also important that the design team, especially those responsible for the public spaces such as the architects, master planners, transport planners, ecological designers, drainage designers and landscape designers, recognise that the decisions they make about space planning and use will have a major part to play in how the community is able to engage and organise its own activities creating their own social value legacy.

To maximise social value through design, it is important to explore how the design is developed and delivered, and what social value design interventions and specifications can actually generate for local communities.





# Maximising social value through The How

Project management and design teams can deliver social value not just in the design that is built but also through managing their teams and delivering their designs. They should use the Place-centred TOMs to develop their own targets and strategies to maximise social value for the community.

For instance, this could include using targeted recruitment schemes in local universities or colleges to provide local people with disabilities training opportunities over the course of a project. There are opportunities to generate social value at each stage of the RIBA Plan of Work. (See the Social Value Plan of Work in [Chapter 5](#))

## YEME Tech, The Community App Community Engagement

### The Challenge

To drive place-specific entrepreneurial solutions to challenging concerns of local communities and urban fabric.

### The Process

The YEME Tech Community Data Platform is a comprehensive series of tools that uses community activities and assets as the basis for stimulating greater social interaction, targeting existing facilities and assets of the city to build communities around these. At the heart of the platform is a dynamic and complex data-gathering, categorisation and enrichment process that digitally maps community assets, activities and events to provide a catalyst for change informing planning and city decisions. This data serves several different uses, from policy-making and urban design to social prescribing and community building. The platform is specifically designed to help local businesses and organisations improve social interaction for their user/resident groups.

### The Outcome

- » **Increased integration** – The app aims to prevent anti-social behaviour and crime by increasing social integration by showing community activities
- » **Reduced community siloes** – exposing vulnerable individuals to relevant groups can help tackle social isolation
- » **Improved engagement** – The app aims to connect users that are unfamiliar to their surroundings such as university students
- » **Increased community data knowledge** – location and participation data can be mapped to identify gaps in services and recognise community trends and activity clusters
- » **Enhanced community cohesion** – increasing activity awareness will increase participation





# Maximising social value through what is specified

Design teams should consider how their design can maximise opportunities for local suppliers and providers to be involved in the project and how this may influence their specifications and procurement strategies. For example, a design team may specify the need to use low embodied-carbon materials, then specify the exclusive use of a locally grown wood type to be used in the design, and procure a local carpentry team to prepare and finish the wood to be used during construction.

## Gwynfaen Farm, Stride Treglown

### Local Material Specification

Gwynfaen Farm is an ultra-low carbon housing development outside of Swansea owned by two housing associations – Pobl and Coastal. This residential design is set to see the construction of 144 energy-efficient homes, including a sustainable drainage system to manage water run-off, with a landscape design that is designed to nudge residents towards a healthy lifestyle.

### The Challenge

The design will create a strong sense of place by echoing the local architectural vernacular and connecting fluidly with its surroundings to encourage outdoor activity.

The core purpose for Stride Treglown's integration of locally sourced material in this project was to prioritise local wealth and employment opportunities within the area around the project site.



### The Process & The Outcome

- » Use of locally sourced materials (timber and stone) which prioritised off-site manufactured timber panels for the houses and materials sourced within a local radius (approximately 40 miles)
- » A mix of affordable tenures: two-thirds affordable, one-third for sale on the open market
- » Encourages healthier lifestyles for residents: This development reduced car parking, encouraged sustainable travel and prioritised outside space
- » Integrates vernacular architecture and local context in outdoor activity
- » Optimises renewable energy and thermal efficiency, with an EPC rating of 'A'
- » Whole life carbon reduction – the design has undergone a lifecycle assessment to minimise embodied carbon, prioritising locally sourced, low-VOC finishes

## The How

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**The Challenge** Not enough buy-in from clients/ relevance of contract management requirements

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**The Question** How can social value be integrated at each stage of a project's lifecycle? How can a design team deliver social value with their project teams?

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**The Output** The Social Value Plan of Work and Design Team Social Value Action Plans

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- | <b>'How' through the project lifecycle:</b>                    | <b>'How' through the project team:</b>  |
|--|---|
| » Carrying out a local needs analysis and community engagement | » Employing local people on the contract  |
| » Meanwhile use based on community request or need             | » Creating intern opportunities, year-out jobs and apprenticeships for young people   |
| » Doing a social infrastructure assessment                     | » Reaching out to schools to provide mentoring and support CV writing (See <a href="#">HLM Architects' Social Mobility Pledge</a> )             |
|  | » Supporting local businesses or community projects by offering expert business advice  |
|  | » Volunteering in the community as a part of their day job and including volunteering to provide expert advice to local design SMEs or students |
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## The What

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**The Challenge** Lack of an industry standard of best practice

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**The Question** What design decisions allow for other end-users or wider community members outside a design team to continue creating a legacy of social value?

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**The Output** The Design for Social Value Checklist

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### 'What' is specified:

- The use of components manufactured or supplied locally
- » Designing spaces that can use of local labour or local sub-contractors through delivery
- » Design decisions that draws existing expertise of local labour and creates opportunities for upskilling
- » The use of weightings in the procurement process to maximise social value (e.g. using the TOMs)

### 'What' is designed

- » The provision of a shared community space to be used for community meetings
  - » External spaces that can be used for community activities and engagement plus an 'activity' plan (n.b. it is the activities in a space that create social value and not the space itself)
  - » The creation of outdoor spaces that inspire activity and improve community wellbeing
  - » Zero carbon solutions that reduce climate-harming emissions
  - » Increased green space to improve biodiversity
  - » Lighting solutions that reduce the likelihood of anti-social behaviour
  - » Design for improved health
  - » Accessibility
-



## Maximising social value through what is designed

As the design team is developing its solutions, it needs to consider a range of issues, specifically how it will deliver a solution that meets core sustainability criteria. It is also important to recognise that social value does not automatically arise from design; people create it as a result of the activities that happen within the physical space created by the design team and built by the contractor. In this respect, the buildings, infrastructure and landscape are the foundation upon which a community can thrive. It is the job of the design team to understand the nature of that community and their needs, and use their design skills to unlock this potential value.

For instance, an open square that is beautifully designed but wind-swept and discourages community activities is worth far less to a community than a run-down open space that is loved, provides shelter and entertains the community throughout the year. The space itself is not what matters; it is how that space is used to build connectivity and community resilience.

The design team should consider:

- » how their solutions maximise social benefits
- » the potential for the users and the community to create their own social value

In the design of all building typologies and transport infrastructure there is substantial research to show that environmental qualities impact significantly on people's health and wellbeing. Physiological aspects such as good access to daylight, views, appropriate acoustic separation, comfortable temperatures, and good quality of air all play their part in influencing healthy outcomes. Furthermore, psychological wellbeing is impacted by our sense of ownership, belonging and safety. Feeling connected with others and nature has substantial benefits to mental health outcomes. When these aspects of the built environment are addressed with people in mind, the impact on social value is potentially huge.



### Useful References

The [Social Value Toolkit for Architecture](#) has been developed to provide a process for demonstrating and evaluating the impact of design on people and communities, which should help address this current gap in knowledge and understanding of social value in design.<sup>14</sup>

The [WELL Building Standard \(WELL v2\)](#) is a vehicle for buildings and organisations to deliver more thoughtful and intentional spaces that enhance human health and well-being. WELL v2 includes a set of strategies, backed by the latest scientific research, that aim to advance human health through design interventions and operational protocols and policies and foster a culture of health and well-being.

There are [ten concepts](#) in WELL v2; Air, Water, Nourishment, Light, Movement, Thermal comfort, Sound, Materials, Mind and Community. Each concept consists of features with distinct health intents and are classified as either preconditions or optimisations.

The [Decarbonising Transport Plan](#)<sup>15</sup> by the Department for Transport sets out travel/ journey targets for the decarbonising all forms of transport. This includes commitments, actions and timings that indicate how much walking or cycling infrastructure will be needed across all developments. Design and transport planning teams can use this guidance when specifying what is designed to ultimately maximise the community health and environmental objectives of social value in their project design.

**Figure 8:** The 10 concepts in WELL v2 to maximise health and wellbeing in design



<sup>14</sup> [The uncomfortable truth about post-occupancy evaluation](#)

<sup>15</sup> [Department for Transport, Decarbonising Transport: A Better, Greener Britain \(2021\)](#)



# The How Engagement

When establishing a design concept for a building or space, the design team should collaborate with the local community to understand how the design can address local needs around a site area and build the relationships needed to maintain the social value generation within a site's impact area. Community engagement should be inclusive and aim to go beyond a 'tick-box' consultation process and needs to be reviewed throughout the design process. For example, this could be in the form of co-design and community reviews at different stages to embed local knowledge and facilitate local activities in a design's long-term functionality.

## The Deaf Academy, Stride Treglown

### Community Engagement

#### The Challenge

When Stride Treglown developed the brief for the new Deaf Academy they wanted to create a learning environment that was in line with DeafSpace standards to provide a space that allowed the children to thrive and prepare for the world waiting for them.

#### The Process

The team at Stride Treglown used innovative CGI images and walk-throughs with the end-users (staff and students) to visualise room dimensions by marking out and mocking-up spaces in their existing buildings. The engagement earned Stride Treglown valuable insights into the extent to which deaf people's experience of learning, holding conversations, privacy, acoustics and safety are critically supported by their physical environment.

#### The Outcome

The Deaf Academy is a world-leading bespoke new school for deaf young people. The final design included considered acoustics, unobstructed sightlines, considered lighting and bespoke circulation space. Health and safety in-use is emphasised by mitigating the raised risk of collisions which deaf people can have through lack of audio cues by rounding off corners with obstructed views and using glazed doors and walls.





## The How During design

The design teams need to consider how they may add social value through their own CSR (Corporate Social Responsibility) activities, such as upskilling local people through offering internships and training opportunities for year-out architectural students, providing expert advice to local businesses, and getting involved in community outreach programmes.

### The Social Mobility Pledge, HLM Architect

#### During Design – CSR Initiatives

HLM Architects level up local employment opportunities and improve the employability of young people through their CSR initiative, the Social Mobility Pledge. The company embeds social value in their design process by creating a clear, accessible and supportive pathway to recruitment, training and employment opportunities for all local children from age five to qualified-architect level.

HLM's interventions aim to develop the skills needed to join the world of architecture and ultimately diversify their pool of local employees to include residents of the most deprived areas.

They revolve around:

#### **Outreach**

Reach out to schools to provide coaching through quality careers advice, enrichment experience and mentoring.

#### **Access**

Provide structured work experience and apprenticeship opportunities.

#### **Recruitment**

Adopt open employee recruitment practices which promote a level playing field.





# The How

## Meanwhile uses

Meanwhile use is an opportunity for design teams to support local start-ups, SMEs and VCSEs or other community initiatives aimed at creating social value by providing them with a temporary home base or affordable workspace on an empty site. Meanwhile use can provide an avenue for design teams to learn about local needs, the design and site use can be informed by and address identified needs. This needs-based design resulting from meanwhile use also ensure the integration of local cultures or identities in the design going forward.

### The Blue House Yard, Meanwhile Space CIC

#### Meanwhile Use

Blue House Yard, London – High St Works / London Borough of Haringey/ Meanwhile Space

#### The Process

In partnership with the London Borough of Haringey and High Street works, Meanwhile Space CIC re-imagined an empty underused site in London into a public realm and an inclusive place for local creatives and entrepreneurs to rent affordable workspace.

After the meanwhile use period of five years, the site will be redeveloped by the London Borough of Haringey.

#### The Outcome

- » 80% of occupiers are local
- » All spaces are let on a fair rent policy with prices being set between 50,80% of market value, on flexible terms and with no up front deposits
- » Retail incubation opportunities, business growth, job creation, to a new community and cultural events venue
- » Residents and workers use the yard to meet others and discover things being produced by tenants and other space users

- » Blue House Yard delivers the following affordable workspace opportunities:

#### Worksheds at Blue House Yard

Flexible spaces best suited to users who want to make and potentially sell

#### Studios at Blue House Yard

Studio and office spaces for creatives and entrepreneurs ranging from 4sqm to 25sqm

#### Events at Blue House Yard

Space for people who want to run and attend outdoor events

#### Bus Cafe at Blue House Yard

A double-decker bus transformed into a café with seating internally and in the yard. A chance for food start-ups to operate without taking on the risks associated with a high street unit.





## Modular Housing for Cambridge Homeless Community, Allia

### Meanwhile Use

#### The Challenge

Cambridge suffers from high house and land prices and high levels of homelessness. As a result, there is insufficient housing stock available to provide pathways out of homelessness.

#### The Process

Allia commissioned a cost-effective single person modular housing unit of 25m<sup>2</sup> from a local social enterprise and identified unused land awaiting development to build them on.

#### The Outcome

- » Training young and formerly homeless people in modern methods of construction
- » Unused land brought into socially beneficial use
- » People accessing high-quality transitional housing
- » A supportive environment which created cost savings and better outcomes





## Sheffield UTC Graffiti Competition, HLM Architects

### Meanwhile Use

#### The Challenge

At Planning, HLM worked with Wates Construction on Sheffield UTC in an area known for graffiti in the city centre.

#### The Process

The design team and contractors opened a competition for the local graffiti artists to submit entries, and the winners were allowed to paint and display their work across the site hoardings.

#### The Outcome

The artists felt connected to the project, and there has been no vandalism since the designed building was occupied. Sheffield UTC also looked to partner with local businesses to get involved in training programme and help set the curriculum thereby creating a wonderful relationship between the college and the local professionals.

Photo by [streetartsheffield.com](http://streetartsheffield.com)





## The How During construction

Given that most architecture practices in the UK are small scale and can rarely hire apprentices, it is key for project design teams to ensure that local apprenticeships and training opportunities are embedded in a local area at this stage. Some social value conditions are captured within a Section 106 agreement, such as requirements for local labour, local spend and apprenticeships. Innovative contractors will do more than this, including working with partners to provide job opportunities and training for those furthest from the job market, increasing local supply chain spend, digital mentoring and embodied carbon reductions.



### 245 Hammersmith Road, Sheppard Robson

#### Construction

A 330,000 sq. ft. commercial office completed in 2019 in the centre of the London Borough of Hammersmith & Fulham.

#### The Process & The Outcome

The contract to carry out the construction of the building was won by LendLease and included commitments to deliver and report on social value. Between 2017–2019, LendLease achieved 211% progress against their social value targets measured using the National TOMs (2019) Framework.

The total social value delivered as a percentage of the overall contract value, 28.2%, was

well above the baseline target with seven notable 'misses' including spend with and support for SMEs, savings in CO<sub>2</sub> emissions and employing people who are long-term unemployed. Highlights from the project included a partnership with a local enterprise studio, volunteering at the local community centre and supporting unemployed and socially disadvantaged people from under-represented groups in achieving industry-recognised qualifications and site experience through apprenticeships.

[See full case study here](#)





## The How

### In use: property management

The property management team plays an important role in unlocking social value through procuring its facilities management services, such as security staff, maintenance and repairs, and cleaning services. The design team also has a vital role in bridging the gap between the occupier, the community and the local council to unlock opportunities for the occupiers to employ local people, reach local schools and volunteer in the community .

### Build Studios

#### In Use: Property Management

Build Studios is a co-working space and hub for the built environment sector located in the heart of London. With events, education and work space, Build Studios aim to inspire people about the built environment through collaboration and learning.

Build Studios are committed to developing a socially responsible built environment sector and work with their community to improve access, aspiration and cohesion.

From their London space, Build Studios run:

- » Affordable workspace
- » Education and outreach programmes to further people's understanding of the built environment
- » Events, seminars and networking to inspire the next generation of built environment professionals





## The How

### In use: occupation

The occupier has the opportunity to create the most social value through how it engages with the local community, provides jobs and training opportunities for local people, engages with the local supply chain and strives to protect the environment. Design teams can also encourage community ownership and stewardship of design at this stage through end-user involvement at the beginning of a project and the use of locally sourced material to engrain a shared responsibility to maintain a legacy of social value. Feedback loops between the client or end users and the design team about how social value creation is being enhanced by design are crucial to learning the best ways to deliver social value in future. One thing to consider is the development of 'Social Leases'<sup>1</sup> that remind occupiers of their agency in a community and their opportunity to make a real and lasting difference

<sup>1</sup> An extension to the idea of 'Green Leases' and builds on existing precedents within many Section 106 agreements that require occupiers to submit and update their Green Travel Plans every few years

## Mellor Primary School Extension, Sarah Wigglesworth Architects

### In Use: Occupation | Community Engagement

#### The Challenge

Embedded in its woodland setting on the edge of the Peak District, this extension to Mellor Primary School by Sarah Wigglesworth Architects (SWA) aimed to provide a series of indoor and outdoor learning spaces that establish new connections to nature.

#### The Process

In collaboration with a team at Mellor Primary School and contractor MPS, the extension was constructed using natural, locally sourced materials. The building takes inspiration from the Forest School ethos at Mellor, with the habitat wall in this design being central to the architectural concept.

- » The proposal used natural and reclaimed materials with low-embodied energy while benefitting from efficiencies of modern methods of construction
- » Locally-found timber offcuts, clay tiles and glass bottles infill the compartments of the habitat wall
- » Weekend build events saw parents, teachers and SWA team pitch in to construct the habitat wall using salvaged materials

#### The Outcome:

- » Imaginative and ecologically diverse cladding compartments to provide homes for birds, bees, bugs and bats were designed in collaboration with the school children
- » The design provides indoor and outdoor learning spaces that forge new connections to nature
- » The uplifting atmosphere of the extension transforms the school into a stimulating environment, which staff, children and the community feel proud of and enjoy spending time in
- » End-user involvement during earlier stages of the project ensured stewardship once the design team left and the finished building benefits from close collaboration with the school and wider community





## HLM Impact (Post-Occupancy Evaluation tool), HLM Architects

### In Use | Community Engagement

#### Project overview

HLM was commissioned in 2016 as part of a joint venture with Campus Living Villages to provide the architectural and interior design services for two new student halls of residence (Whitehorn Hall and Powell Hall) at the University of St Andrews.

#### The Challenge

Both buildings sought to create a new socially driven and environmentally sustainable model for student accommodation. The original client brief focused on commercial and practical requirements, encompassing a commercially viable extension of current student residence buildings with strong sustainability factors.

#### The Process

HLM worked closely with the client team to scope and develop a broader brief that recognised the project's wider social value opportunities, and the need to respond to student requirements.

HLM worked with the client team to ensure the design was informed by a range of engagement work to make a positive contribution to the student experience, and the health and mental wellbeing of the student population.

HLM Architects created a bespoke people-focused Post-Occupancy Evaluation (POE) tool (HLM\_Impact), which captured design feedback and was used to define the social value of design in a monetised way. The study focused on social impact across the design and operational stages of the project. In this context, social impact refers to the impact of the project on the lives of people interacting with the scheme, specifically the students living and working in the buildings.

The evidence required to capture and measure the contribution of HLM through the operational design and their approach to design practice was achieved through stakeholder engagement approaches such as telephone consultations during the project process and through POE once the project was completed and occupied, followed by a desk-based analysis of results including Social Return on Investment analysis.

#### The Outcome

The social impact assessment study evidenced that the student residential project at St Andrews was delivered in a way that maximised the value of early consultation and engagement with client and end-user groups. It drew this insight through into an informed design process and showed the impact generated as a result for the students living in the halls for years to come.

HLM has since further capitalised on these insights by developing an internal process to close the social feedback loop on design, ensuring that lessons learned from this project are fed into the next similar project brief.





# The How Future Use

In recent years, RIBA has advocated for the refurbishment of old buildings rather than demolishing them entirely, as this reduces the carbon emissions and pollution involved in constructing a new replacement building. The design team and the contractor are responsible for setting out how a building or space can be used at the end of its lifecycle by identifying ways to re-use building materials in other projects after disassembly or set out ways to provide change of use opportunities in the design features to enable the local community to maximise site space for community use or activities.

Design teams should obtain feedback from local users of a space or building to identify local needs or opportunities to re-use materials or activate older buildings.

## Brighton Waste House, BakerBrown Architects

### Future Use: Material Re-use

The Brighton Waste House is the UK's first permanent public building made almost entirely from material thrown away or not wanted. It is a contemporary, low energy, permanent building made up of over 85% waste material drawn from household and construction sites and was created almost entirely by young people studying trades in the built environment.

### The Challenge

Designed as a research facility and design workshop for the University of Brighton's Faculty of Arts, the project aimed to prove that "waste" material has potential to become a valuable resource.

### The Process

Over 300 students worked on the project, which was initially fabricated in the workshops of City College Brighton and Hove, and then assembled and completed by students and apprentices between May 2013 and April 2014

During construction, over 750 school pupils from over 35 local primary, secondary and tertiary colleges visited the Brighton Waste House site to learn about sustainable values and practices

### The Outcome

- » The low-energy building has an EPC 'A' rating
- » Furniture designed for the interior by students to explore ways of mixing waste with organic materials
- » The facility is used by students and is available as a community resource for hosting sustainably-themed design workshops and events

### Waste House recycled material statistics

**Wall insulation:** 19,800 toothbrushes donated by Gatwick Airport, school children and Freegle; **2 tonnes** of waste (from rag trade) denim jean legs & arms; **4,000** VHS video cassettes; **4,000** Plastic DVD cases; **7.2m<sup>3</sup>** of polystyrene from old packaging; **250m<sup>2</sup>** of 'seconded/ returned' Kingspan insulation **Windows:** 500 cycle inner tubes, used to seal windows and sound-proof 1st floor **Stair treads and risers:** **10m<sup>2</sup>** of compressed recycled paper forming stair treads and risers – supplied by Lindner Group **Roof:** **65m<sup>2</sup>** of rubber membrane for roof finish – made from old Pirelli car tyres **External façade:** **10 tonnes** of chalk destined for landfill – used to create a beautiful load-bearing internal wall; **2km** of second-hand 2"×2" softwood timber used throughout building and sourced from skips/City College/ Brighton Wood Store.

## Bringing The What to Life Key steps to maximising social value

The diagram to the right presents some of the key drivers to create social value in design. In other words, what elements of a design drive communities impacted by a project to create more social value. The Social Value in Design Checklist in [Chapter 6](#) provides a framework to promote these interventions in design decisions.

**Figure 9:** Key issues to be considered as a part of the design process, 'Designing for Social Value'. (Diagram adapted from the Towns Fund's Social Value Elements)



# 5. The How: Social Value Plan of Work

The Social Value Plan of Work is the Taskforce's answer to 'the How.' It maps out activities that can embed social value into a scheme at each stage of the RIBA Plan of Work and provides examples of the relevant deliverables at every point. Often, the drivers and incentive to embed social value in the design process can come from different project team members. For this reason, the Taskforce has also added who should take responsibility at each stage.

This includes:

## **The Client**

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This refers to the entity that commissioned the design project, i.e. the investor or developer of a design project.

## **The Contractor**

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This refers to the general contractor who oversees the construction phase and closely

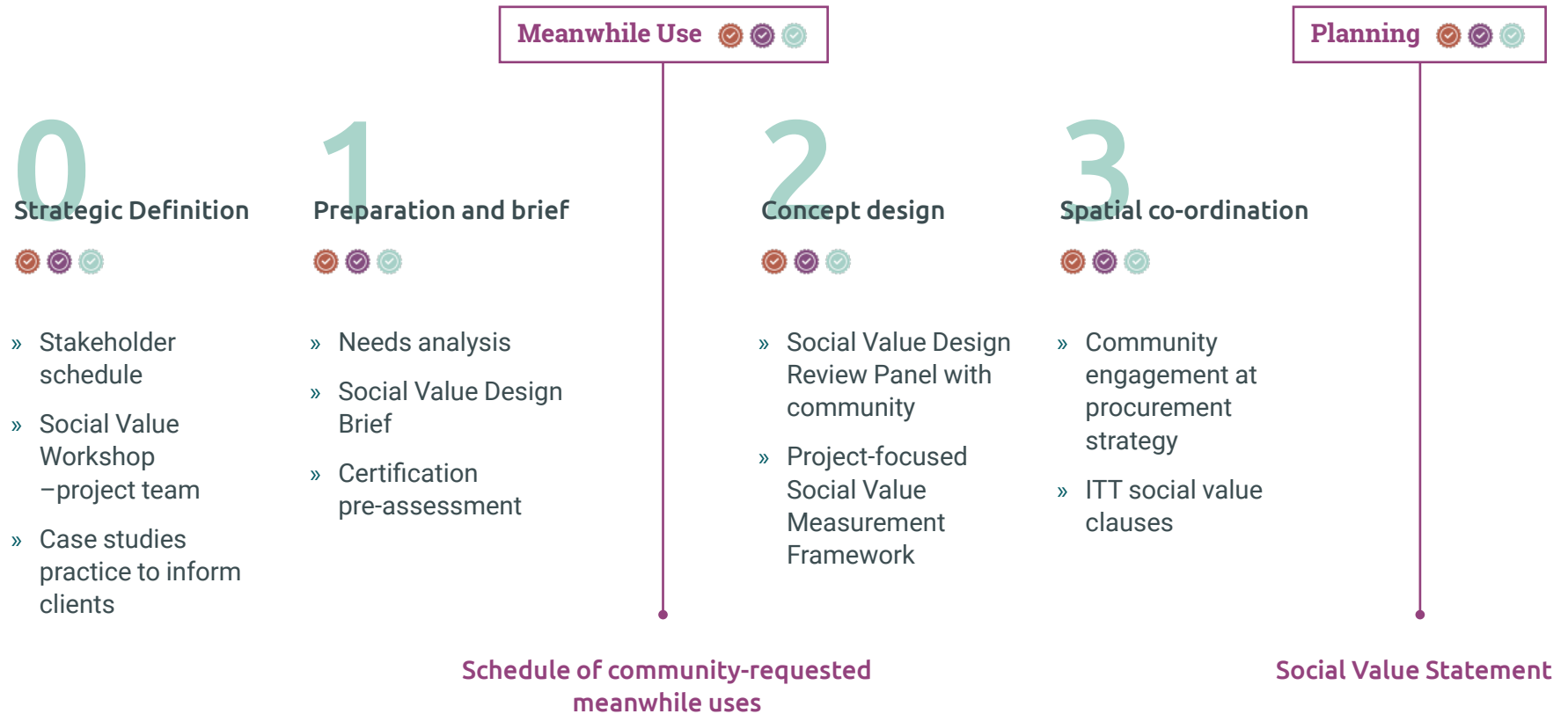
follows the architect or design team's plans, plus is responsible for the subcontractors on-site.

## **The Design Team**

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This refers to the architects, urban designers and engineers who specialise in specific task areas in the design project process. See a full list of actions and key responsibilities in [Appendix 1](#).

**Figure 10.** The Social Value Plan of Work



# 4

**Technical design**



- » Community engagement at procurement strategy
- » ITT social value clauses

# 5

**Manufacturing and Construction**



- » Social Value Action Plan (SVAP) – Contractor
- » Social Value Workshop

# 6

**Handover**



- » Community engagement
- » Social value client feedback forms
- » SVAP–property management

# 7

**Use**



- » Community activities schedule
- » Targets and Feedback loop – occupiers

**Future Use**  

Future-use Social Value Report

MONITORING SOCIAL VALUE CREATION



## 0. Strategic definition

### Questions to ask

Does the project have social value drivers or aspiration? Who are the key stakeholders?

Can the local authorities help identify social value priorities?

How can social value be created within the project team and wider organisation?

Does the client know the benefits to creating social value through the project?

### Social value deliverables

- » Stakeholder schedule and prioritisation
- » Social value project team briefing and workshop
- » Social Value Maturity Assessment for the project team (See [our SVMI](#))
- » Compilation of relevant case studies practice to inform clients
- » Typical questions that can be asked at briefing stage especially for private clients on how to approach social value (See the Social Value in Design Checklist in [Appendix 1](#))
- » Social Value in Design Guidance notes - including basic social value guidance and definitions for starters

## 1. Preparation and Brief

### Questions to ask

What are the local needs? What kind of community facilities would benefit the local area?

Who can you engage with to set out the projects social value goals? Third sector? Local authority? Community action groups?

Will the project pursue any form of certification such as LEED or WELL?

### Social value deliverables

- » Needs analysis
- » Social Infrastructure Assessment
- » Scope & responsibility from clients
- » Materiality analysis and optional Social Value Charter
- » A clear timeline and method of consulting and reporting back to the community throughout all project stages
- » Design team Social Value Action Plans: each design team will need to provide ongoing quarterly updates to the project manager using Social Value Portal
- » Social Value Design Brief: to specify/track what stage of the brief is responding to which social value needs (See [Chapter 7](#))
- » Certification pre-assessment

## Meanwhile Use

### Questions to ask

Based on community feedback, are there any opportunities to unlock social value across the site?

Can you identify and recommend placemaking opportunities to create social value through meanwhile use activity?

Can you support local initiatives or start-ups with site access during the meanwhile period?

### Social value deliverables

- » Use the needs analysis and Design Guidance Document to inform recommendations for placemaking and meanwhile use decisions
- » Set up community competitions for the best temporary use of site or agreed need to be addressed
- » Schedule of community requested meanwhile uses, ranked from most requested to least.
- » Social Value Measurement Framework for meanwhile use and Social Value Assessment (e.g. measurement on Social Value Portal)

## 2. Concept Design

### Questions to ask

Does the project have clear social value targets and a place-centered Social Value Measurement Framework, adapted from the TOMs?

Have you engaged with the community to understand if the design will respond to community needs?

Have you included representation from a wide range of demographics in the design review?

### Social value deliverables

- » Social Value Design Review Panel with community (building on the Social Value Charter)
- » Project-focused Social Value Measurement Framework
- » Concept design report to include social value of built elements as percentage of target construction cost
- » 'Design for Social Value' statement Included in concept design report or pre-application
- » Create a training opportunity for young people and locals by involving design students in the design review panels

## 3. Spatial Coordination

### Questions to ask

Have you set targets for social value delivery throughout the project lifecycle (i.e. construction and in-use) and procurement process?

Take into consideration previous social value performance of contractors/subcontractors

### Social value deliverables

- » Quantify any potential social value add and describe place-based recommendations through a Social Value Assessment/ Action Plan
- » Assessment of potential social value beyond fiscal value i.e. indication of how much social value is generated by different spaces, building types or building use

## Planning

### Questions to ask

Have you supported your planning application with a Social Value Statement that includes a needs analysis, opportunity mapping, proposed measurement framework, targets and delivery strategy?

### Social value deliverables

- » Social Value Statement including a 'Design for Social Value' strategy showing how the development will benefit the community during 'construction' and 'in-use' phase. Report should include 3rd sector delivery partners

*Examples of initiatives to include: project team (community engagement initiatives, CSR, local employment, etc.), construction (materials chosen/built elements, methods of construction, site logistics, project team structure/initiatives), in-use (access to green space, open space, community space, sustainability, community use, public accessibility)*

## 4. Technical Design

### Questions to ask

Do you have an ongoing reporting system of your own social value creation (CSR initiatives and technical decisions specific to the project)?

Does the procurement strategy include agreement of social value weightings to be used within ITT requirements?

### Social value deliverables

- » Quarterly progress reports
- » Highlight and include costs for the delivery of social value
- » Showcase examples of output and deliverables at each stage
- » Design for social value report
- » Site / factory visits
- » Invitation to tender (ITT) social value clauses
- » Community engagement should be throughout but more so at the procurement strategy stage to confirm what needs can be addressed by team, local authority or third sector
- » Feed back to the community on feasibility and decisions made

SOCIAL VALUE OBJECTIVES IN  
PROCUREMENT PROCESS

## 5. Manufacturing & Construction

### Questions to ask

Do your contractors understand the importance of social value, your targets, approach and their role in its delivery?

How regularly will social value be monitored and tracked as it may be less intensive at this stage - quarterly or annually?

Continue to collect data and evidence on Social Value Portal

### Social value deliverables

- » Social Value Action Plans with targets are agreed with contractor
- » Social Value in Design Workshop to share initiatives and explain approach and methodology i.e. why decisions were made with social value in mind
- » Monthly or quarterly reports which include how social value embedding design initiatives have been delivered/progressed
- » Site Overview: Ensuring design team know that they still have SV responsibility on site level.
- » End of project report and case study

MONITORING SOCIAL VALUE CREATION

## 6. Handover

### Questions to ask

What lessons have been learned?

How can you ensure a social value legacy?

Do occupiers understand the social value opportunities?

Have you developed a project case study?

Feedback and share best practice with all stakeholders including contractors and their supply chains.

### Social value deliverables

- » Property management procurement
- » Community engagement to inform social value strategy for property management procurement
- » Design team handover and report (e.g. this could be aligned to TOMs initiatives, WELL certification, Quality of Life Foundation Framework or a process to explain the use of designed sustainability features or community spaces for users to create more social value)
- » Social value client feedback forms (highlighting what was promised was delivered)
- » Property management Social Value Action Plan
- » Project visits
- » Quarterly reports by property manager

## 7. Use

### Questions to ask

What lessons have been learned?

How can you ensure a social value legacy?

Do occupiers understand the social value opportunities?

Have you developed a project case study?

Feedback and share best practice with all stakeholders including contractors and their supply chains.

### Social value deliverables

- » Agree social value targets with tenants
- » Schedule community activities or events to regularly utilise the design
- » Quarterly updates
- » Feedback loop to maintain social value in a project after design process and create a legacy
- » Annual report to fund

## Future Use

### Questions to ask

How can the final design or infrastructure be used post life-cycle?

What adaptations can optimise any future change in use to best serve the changing needs of the community?

### Social value deliverables

- » Future-Use Social Value Report: Review potential re-use of building to best serve future change in community needs (e.g. disassembly for material re-use, change of use of spaces, materials)
- » Social value should be mentioned in pre-construction information and the Health and Safety manual



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## Key activities

The Social Value Plan of Work should be referenced for detailed guidance, however, a few key activities that the development and design team will need to consider are highlighted below:

### Needs and opportunities analysis

A needs and opportunities analysis is used to inform the development of a place-centred social value measurement and management framework, alongside comprehensive stakeholder engagement. The analysis should also identify key local social value policies that should influence both the development of the TOMs and the design as a whole.

### Community engagement

Community engagement allows the 'voice' of local stakeholders to be heard and to influence the measurement and management framework. It is important that community groups feel they are 'designed with' rather than 'done to.'

### Social Value Measurement & Management Framework

A team will need to develop a Social Value Measurement & Management Framework for the development. This may be based on the TOMs but adapted to reflect the specific development's needs and opportunities, including a clear link to community engagement. This framework can be used as a management tool that reflect

the change that the development team and community are looking to achieve on the basis that 'what is measured is managed' (and also optimised).

### Social Value Action Plan

A Social Value Action Plan (SVAP) is based on the Social Value Measurement Framework. It should be used to set targets and 'value' the impact of the activities and commitments being made. Each design team member should have their own SVAP that they commit to monitoring progress against (see [Chapter 6](#) for more detail). (See also [Chapter 7](#))

### Social Value Statement

The Measurement Framework (TOMs) are used to build a Social Value Assessment that is used within the Social Value Statement submitted as part of the planning permission. The Statement will include specific social value targets as well as a delivery plan.

### Design for Social Value Review

The design team should consider conducting regular 'Design for Social Value Reviews' that specifically look at how the design proposals are responding to the social value framework and targets, for instance the provision of an internal space that could be used for community meetings or a community garden, lighting designed to reduce antisocial behaviour, tree planting to provide shade and

carbon sequestration or an external space for community events.

### Design team handover

Where the design team explains how design features or spaces can be used to maximise social value by end users.

### Materials specifications

The design team should consider how they can specify materials and solutions that can be provided locally or from the region to ensure that the local area benefits from the creation of new jobs and local spend.

### Tender Documents

The tender documents (ITT) need to include clear requirements for the Tier 1 contractor to submit and commit to a social value offer. Weightings used in the evaluation should be a minimum of 10%, sitting alongside technical and costs.

### Quarterly Reporting

The contractor will be expected to update their progress against their social value targets every month, with quarterly reports being produced for review by the developer.

### End of Project Case Study

The contractor and design team should be asked to produce an end-of-project case study that shows how they have delivered against targets, lessons learned and 'people focused' case studies.

# 6. The What: Social Value in Design Checklist

A Social Value in Design Checklist has been developed as a common reference point as to what design decisions create social value for the local people and communities impacted by a project. The checklist will allow project teams to understand best practice examples and help establish a baseline of what good looks like.

A key aim of the checklist is to support project teams to prioritise design decisions that promote social value to their clients and stakeholders. In turn, the checklist should help design teams to demonstrate their commitment to social value when competing or bidding for work. The checklist has been divided into four principal themes:

- » **Needs-Based Design**
- » **Economic opportunities**
- » **Social or community focused opportunities**
- » **Environmental opportunities**

This checklist is not exhaustive but is a great starting point for design and development teams aiming to create social value through their design work to consider and build on during their design process.

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## Needs-Based Design

This section of the checklist guides how you can ensure that the project design maximises opportunities to address local needs and integrate effective interventions to these needs in the design process and functionality of the final design.

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## Economic

This section of the checklist provides guidance on what in a physical building design empowers communities economically with relevance to education and training, local spend, material specification, governance and affordability.

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## Social

This section of the checklist provides guidance on what building design decisions allow for independent and diverse community use, ownership and management (i.e. build pride, sense of identity, inclusion). It also offers guidance on how a building's design or functionality can improve community health, safety and wellbeing for external users.

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## Environment

This section includes design interventions that enhance a healthy, natural and climate-resilient environment and community through their design.

## Needs-based Design: Engagement

Design decision	Why bother?	Useful links
<p>Have you engaged relevant local community groups to understand existing opportunities and initiatives?</p>	<p>It is crucial for design teams to look at engagement not as a tick-box consultation process, but to engage with a representative demographic of local people. Gathering a range of needs and experiences of spaces, build relationships and develop designs based on local knowledge will ensure the longevity of your social value creating efforts.</p> <p>Additionally, it is good to identify if these spaces can deliver other community engagement events like workshops and meetings between developers and the local people.</p>	<p>See how to maximise social value through community engagement in <a href="#">Chapter 4</a> and <a href="#">The Deaf Academy, Stride Treglown</a></p> <p>Stride Treglown’s <a href="#">The Place Pocket Guide to Engagement</a></p>
<p>Have you used innovative mechanisms (both digital and physical) to involve local people and attract broader inclusive community engagement? (i.e. Social Pinpoint, Commonplace, characterisation surveys etc.)</p>	<p>Due to Covid-19 restrictions , interactive and dynamic digital methods of engaging with local communities can be an essential step to reach as widely as possible across the local area.</p>	<p><a href="#">Social Pinpoint</a></p> <p><a href="#">Commonplace</a></p>
<p>Have you co-designed aspects of the scheme with local people?</p>	<p>Workshops, surveys and meetings with community leaders can help prioritise needs while also identifying specific organisations and initiatives that could be supported throughout the lifecycle of a development to generate positive outcomes.</p>	<p>You can see examples of how the Mayor of London’s Design review groups function to inform how local needs can be addressed in new developments <a href="#">here</a></p>
<p>Have you hosted any workshops or surveys to understand what social value interventions you should prioritise as a design team and in the project brief?</p>		<p>Social Value Maturity Assessment for the project team (See <a href="#">our SVMI</a>)</p>

## Needs-based Design: Local Needs Analysis

Design decision	Why bother?	Useful links
Have you liaised with the police or gathered local community wisdom on the key issues of local safety near the site?	Community knowledge and experience on the recurring safety issues will inform the design interventions made or CSR initiatives your design team engages in an effective and customised approach. This will also direct you to which community partners you might need to collaborate with to reduce crime in the area through your project and help the vulnerable community members live independently.	See how to maximise social value through CSR initiatives in <a href="#">Chapter 4</a> and <a href="#">HLM Architects' Social Mobility Pledge</a>  <a href="#">Commonplace Safe Spaces Heatmap</a>  <a href="#">Secured By Design</a>
Have you used local-level data to understand levels of deprivation?	The first step in preparing a Social Value Strategy that will support the delivery of the greatest value for local people is to recognise the importance of local context. The purpose of a local needs analysis is to understand the key needs and opportunities when it comes to delivering social value in the local area. This will help to identify where the new design/development can make a real and long-lasting difference.	<a href="#">Social Value Portal's Local Needs Analysis reports</a>  <a href="#">IMD data</a>
Have you understood the council's social value objectives and asked about community needs when meeting the relevant planning authorities?	This is important to ensure the relevance of the project to creating social value and establishing how ambitious your design team can be to contribute, support, or challenge the existing objectives.	Review the relevant Local Plan documents.
Have you crafted the engagement/needs analysis questions in collaboration with the community?	This ensures that the local needs and priorities that are uncovered are authentic and the needs analysis process/community engagement has not been influenced or skewed to the client or design team's objectives by the way questions are phrased.	



## Needs-based Design: Heritage/Identity

Design decision	Why bother?	Useful links
Have you conducted a social infrastructure audit?	<p>Social infrastructure is a core element to designing for social integration and reducing inequalities in communities resulting from difficulties in accessing services.</p> <p>Design teams should consider the social infrastructure needed and identify ways in which social and spatial outcomes of good social infrastructure, that are enhanced through design interventions, can be delivered through their project.</p> <p>For example: In London, social infrastructure design interventions include: co-location of council services; transitional spaces that create a connection between the wider community but consider security lines in the change in threshold from private to public and; engagement and participatory design.</p>	<p>Mayor of London: <a href="#">Connective social infrastructure – How London’s social spaces and networks help us live together</a></p>

Design decision	Why bother?	Useful links
Have you identified place making opportunities that promote local character and heritage?	<p>RIBA’s key design principles for the ‘Sustainable Communities and Social Value’ outcome focus on greater permeability, external social spaces, and mixed-use developments that prioritise placemaking that expresses identity and territory.</p> <p>Public spaces are essential for human connections and public activities as they are indicators of the vitality and inclusiveness of a city. However, the concept of public space is regularly contested due to social and political inequalities. It is vital to ensure that a range of local demographics are represented and ‘the what’ is designed or involved in identifying the public safety, inclusion or cultural needs that a design can help address.</p>	<p>Example: <a href="#">Stride Treglown’s Six Bells project in Abertillery</a>.</p> <p>The project site had been part of a memorial for the deaths of families lost in a coal mining disaster. The community were against the creation of the school near this memorial. Together with the client and contractor, Stride Treglown created a school that honoured the memorial statue, and now children understand the value of this heritage as they play in the statue’s shadow and the school is loved by the community – a 100% turnaround of public opinion in a very short period of time after opening the site for use.</p>
Have you supported local arts and culture through the design?		<p><a href="#">London Property Alliance’s Diversifying Real Estate: Sexuality</a></p>
Have you identified hidden communities, especially in more affluent neighbourhoods, to encourage unexpected synergies across diverse income groups?		<p>Arup: “Queering Public Spaces” – <a href="#">Available here</a></p> <p><a href="#">Safe in the City? Negotiating safety, public space and the male gaze</a></p>
Have you engaged intergenerational and diverse groups plus groups that reflect the local demographic?		



## The Bermondsey 'Biscuit Factory' Project, London (Building F), KPF

### Building Retrofit | Needs-based Design: Heritage/Identity

#### Project Team

KPF; Arup; Cottrell & Vermuelen Architecture;  
Client: Grosvenor Britain & Ireland

#### The Challenge

The Bermondsey Project is one of London's largest build-to-rent developments and has a Planning Award 2021 for consultation. Conscious of the heritage, which is the namesake for the area 'Biscuit Town', the project retains and references a number of historic buildings, reflecting the site's rich past and integrates a patchwork of former industrial buildings on the c12-acre site. The site also extends and reinforces the eastern end of the extraordinary 'Low Line', connecting the site to London Bridge which lies approximately a mile to the west.

#### The Process

The largest retained building, Building F, provides a unique opportunity to retain a vital element of the site's industrial heritage, adapting it for a mixture of uses. The scheme features five levels of housing resting on top of the time hardened existing structure, which is converted into office and flexible uses at the ground floor. The retention of the building is the cornerstone of the site's extremely ambitious carbon and employment targets. The retention of the building is further justified through analysis of the broader context architecturally, culturally, functionally, and socio-economically.

#### The Outcome

The former Peek Frean Biscuit Factory site in Bermondsey is set to be transformed into a new thriving neighbourhood centred around new homes for rent. The proposals include up to **1,548** rental homes of which **35%** will be affordable housing, a c.**600-place** secondary school, over **14,000m<sup>2</sup>** of new office space and **7,700m<sup>2</sup>** of retail, culture, leisure and community facilities alongside new and improved streetscapes and playscapes, planted trees and new public yards and squares. The car-free scheme improves connectivity and permeability throughout the local area, connecting Bermondsey Underground station with the historic Biscuit Factory site and Bermondsey's traditional retail centre, the Blue Market, via newly created pedestrian and cycle routes.



## Economic: Meanwhile Use

Design decision	Why bother?	Useful links
Are there any under-utilised or vacant spaces and buildings in the local area where you or the client can unlock social value creating opportunities?	Meanwhile use can be used as an engagement strategy to inform future long-term uses. The term 'local' needs to be defined at the start of the project, and the timeframe of the meanwhile use and how it will lead to specific social value outcomes and support local small or start-up businesses must be agreed.	<a href="#">Meanwhile Use London: A research report for GLA</a> – Arup  <a href="#">RIBA: How to make use of vacant spaces after COVID-19</a>  <a href="#">Meanwhile Space CIC</a>
Have you used meanwhile uses to support local businesses?		
Have you used meanwhile uses to support local initiatives, campaigns or community groups?	Meanwhile use should be developed in response to local needs through meaningful engagement with existing businesses, residents and VCSEs.  See <a href="#">The Blue House Yard</a> , <a href="#">Meanwhile Space CIC</a>	
Has longer term occupation by meanwhile operators been considered? (e.g. when the site is developed, will rent be affordable?)		
Has the embodied carbon / de-mountability/reusability/lifespan of any meanwhile structures been considered?		

**Economic: Project team & procurement**

Design decision	Why bother?	Useful links
Have you set targets for your own project team’s social value contributions specific to the project?	It is important to include the client in this process – the client should not expect the design team to make social value commitments without being willing to commit themselves.	
Have you identified local VCSEs or community action groups to add value to the design to address their needs and strengthen their identities or outreach?		
Have you engaged local schools and young people to feedback into the design process at all stages? This is to provide them with training or employment opportunities in the project team.	It is key to ensure that a diverse group of young people from a range of socio-economic backgrounds have been approached in the locality.	Find the most deprived schools you can engage with in a locality based on their <a href="#">Ofsted rating</a> .
Have you prepared social value client feedback forms?	The project team needs to decide whether these forms should be filled at regular points throughout the project or after handover.	
Have you provided proper handover to the property managers and occupiers to ensure they understand the design features that can generate social value?		
Have you specified locally sourced contractors as part of the project procurement and delivery?		
Have you encouraged your partners to adopt ethical procurement practices that create social value, i.e. diversity, equity & inclusion (DEI), fair wage, fair work and payment?		

**Economic: Affordability**

Design decision	Why bother?	Useful links
Have you created a flexible and innovative workspace for different types of start-ups, local entrepreneurs, etc?	Place making and design in cities should create social value by enforcing a balance of affordable housing and hub opportunities. Design should seek to reduce the income inequality gap by developing infrastructure such as learning spaces and affordable work spaces to support social and economic opportunities.	
Have you provided cycling infrastructure above policy requirements?	Research by Transport for London revealed that people cycling (walking and using public transport) spend 40% more each month in local neighbourhoods shops than motorists. Therefore, adapting your designs and external spaces to enable more people to access them by foot or bicycle makes them more enjoyable, healthier, and welcoming, which encourages more people to shop locally, ultimately enhancing local business.	<p><a href="#">Tfl report – Walking &amp; Cycling: the economic benefits</a></p> <p><a href="#">Department for Transport – Decarbonising Transport: A Better, Greener Britain (2021)</a></p>
Have you designed spaces that different types of tenants can use to promote affordability?		
Have you integrated locally sourced materials into the design?	While locally sourced material is good for the local economy, it is important to note that it does not guarantee that it is good for the environment.	(See <a href="#">Gwynfaen Farm, Stride Treglown, Chapter 5</a> )
Have you considered local minerals safeguarding policy areas to source materials?	Therefore, embodied carbon must also be a focus in material specifications for a project	
Have you created publicly accessible affordable areas for leisure?		
Have you considered affordable operation and maintenance (cleaning, longevity of materials, energy costs)?		

**Social: External space**

Design decision	Why bother?	Useful links
<p>Have you designed the public realm to be inclusive and accessible?</p> <hr/> <p>Have you designed the public realm to accommodate existing community activities?</p>	<p>RIBA’s key design principles for the Sustainable Communities and Social Value outcome focus on greater permeability, external social spaces, and mixed-use developments:</p> <ul style="list-style-type: none"> <li>» Prioritise placemaking that expresses identity and territory</li> <li>» Create places for social interaction</li> <li>» Create vibrant mixed-use places</li> <li>» Provide high-quality permeable links to social amenities</li> <li>» Provide high-quality pedestrian public realm</li> <li>» Create inclusive places for community interaction</li> <li>» Create secure places with overlooking views</li> </ul>	<p><a href="#">The Place Standard tool</a></p>
<p>Have you addressed local safety concerns through the design to address the perception of safety and evidence-led Safe System design?</p>	<p>We need to move towards a safer system approach to design that is evidence-led and used to create good natural surveillance of a site.</p> <p>Spaces that are well-lit and overlooked by surrounding buildings make passers-by feel safer. Designs of poorly lit, semi-public space for which no one feels responsible breed crime and fear of crime.</p>	<p>Guidance on designing for crime is provided by the police’s <a href="#">Secured by Design</a> initiative</p>
<p>Have you created promoted active travel and reduced vehicle use through your design?</p>	<p>Encouraging the use of sustainable transport choices is a good attempt to protect ecosystems in an urban area.</p>	

Design decision	Why bother?	Useful links
<p>Have you engaged with the community to identify pre-existing external space needs and identify elements of existing public realm design that are important to their sense of identity?</p>	<p>It is important to set out time and resources to understand local social networks and find ways to incorporate external shared spaces or community structures in designs that enable community members to interact more.</p>	
<p>Have you maximised the amount of external space that is publicly accessible?</p>		
<p>Have you thought about specific ways that the public realm can support the integration of the new community that a development is creating into the existing?</p>		
<p>Have you considered biophilic design?</p>	<p>Biophilic design is an approach to architecture that seeks to connect building occupants more closely to nature. Biophilic buildings incorporate things like natural lighting and ventilation, natural landscape features, and other elements to create a more productive and healthy built environment for people.</p>	<p><a href="#">The Trees and Design Action Group: Trees, Planning and Development: A Guide for Delivery</a></p>
<p>Have you prioritised existing biodiversity and looked at ways of enhancing it?</p>	<p>Safeguarding the natural environment is a key measure of environmental sustainability – a central objective of social value.</p>	<p><a href="#">Biodiversity By Design consultancy</a></p>



## Social: Flexibility

Design decision	Why bother?	Useful links
<p>Have you designed community space with local groups in mind and in collaboration with them to accommodate their needs and help build stronger community networks?</p> <p>Does the design foster learning?</p>	<p>The flexibility of the use of spaces should be grounded in local needs and enhance local heritage and character.</p> <p>Community engagement should be a priority, and providing a space that local communities can use to discuss issues that affect them or plan together is beneficial.</p> <p>Alternatively, work with management companies to ensure that there are opportunities for resident input during the occupation stage can be considered.</p>	
<p>Have you gone beyond the finishing line by developing an events calendar for the first 24 months of use?</p>	<p>It is important that the design team, especially the architects, master planners and landscape designers, recognise that the decisions they make about space planning and use will have a major part to play in how the community can engage and organise its own activities. This can create legacy social value.</p>	
<p>Have you made spaces flexible and adaptable for different users? (i.e. mixed-use, change of use space, accessible for vulnerable people or users with disabilities to access independently etc.)</p>	<p>Sustainable development goal (SDG) 11.7 mandates that by 2030 we need to “provide universal access to safe, inclusive and accessible, green and public spaces, in particular for women and children, older persons and persons with disabilities.”</p>	
<p>Have you designed public realms and interior ground floor uses as an extension of the current surroundings and local activities?</p>	<p>It helps to provide the community with the opportunity to engage with the building and bring the space alive.</p>	

**Social: Interior Space**

Design decision	Why bother?	Useful links
<p>Have you followed or achieved certification for interior space? (ex. WELL certification, etc.) If not, have you considered how the internal environment (finishes, light levels, biophilia, services on offer) can promote health and wellbeing?</p>	<p>The quality of our indoor environment can significantly impact our physical and mental health, wellbeing and economic productivity.</p> <p>Designers should consider creating a design strategy that works towards enhancing good human health and wellbeing. Having a people-first approach to design buildings and communities can ensure that people who occupy them are healthier, more productive, and even happier. For example, if the setting aims to support physical and mental health it can achieve this through adequate exposure to natural light, thermal comfort, movement, promoting healthier diets or reducing exposure to harmful materials.</p>	<p>Explore the ten concepts of WELL V2: Standard   WELL v2 (<a href="http://wellcertified.com">wellcertified.com</a>)</p> <p>Explore the preconditions of <a href="#">the ten concepts of WELL V2</a> as a minimum</p> <p><a href="#">The Quality of Life foundation Framework</a></p> <p>(Quality of Life Foundation aims to improve people’s quality of life by making health and wellbeing central to the way we create and care for our homes and communities)</p>
<p>Have you employed the energy hierarchy, understanding the major opportunity areas through thermal continuity surveys, system validation and measurement? Have you reconfigured the internal arrangement to support passive strategies, if possible?</p>	<p>It is helpful to consider the availability of places nearby for locals to exercise but also key to consider air quality and noise in the design of schemes to avoid contributing to it as well as avoiding placing vulnerable community members near these issues.</p>	
<p>Have you maximised the amount of interior space that is publicly accessible?</p>		

**Environment: Carbon Reduction**

Design decision	Why bother?	Useful links
<p>Have you achieved BREEAM Excellent or Outstanding for New Construction? Or similar standards such as PassivHaus LEED, SKA etc.</p>	<p>As the design team develops its solutions, it needs to consider a range of issues, but specifically how it will deliver a solution that meets core environmental sustainability criteria.</p>	<p>Example of PassivHaus standard design: <a href="#">University of the West of England, Low Carbon Residences – Stride Treglown</a></p>
<p>Do you have a net zero carbon strategy for the project lifecycle and a monitoring plan with specific milestones?</p>	<p>The climate emergency demands action and leadership by architects and the wider construction industry to ensure that new and retrofit buildings deliver net zero whole life carbon in advance of any future regulation. <a href="#">The RIBA 2030 Climate Challenge</a> for example, has challenged RIBA Chartered Practices to:</p> <ol style="list-style-type: none"> <li>1) Reduce operational energy demand by at least 75%, before UK offsetting</li> <li>2) Reduce embodied carbon by at least 50-70%, before UK offsetting</li> <li>3) Reduce potable water use by at least 40%;</li> <li>4) Achieve all core health and wellbeing targets</li> </ol> <p>The RIBA has developed targets and metrics for operational energy use, embodied carbon and water use reduction for different building types.</p>	<p>Example of BREEAM Outstanding design: <a href="#">Uni of Sheffield Social Sciences</a></p> <p><a href="#">UKGBC's Net Zero Carbon Buildings: A Framework Definition.</a></p> <p>EXAMPLE: <a href="#">HLM Zero Carbon operation building Keele IC7</a></p>
<p>Have you promoted sustainable procurement by achieving a supply chain carbon certification? (e.g. Carbon Trust Standard, Planet Mark or equivalent)</p>		<p><a href="#">Planet Mark</a></p>

**Design decision**

**Why bother?**

**Useful links**

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Do a percentage of procurement contracts include sustainable procurement commitments and climate change or carbon reduction training for the project team?

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Do you have a sustainable waste strategy in place as part of the construction phase, e.g. this could be in the form of waste reduction training for labourers and workers on-site?

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**Environment: Material Re-Use and Building Retrofit**

Design decision	Why bother?	Useful links
Have you re-used materials on-site in the design?	<p>The UK currently consumes 600 million tonnes of products annually while generating about 220 million tonnes of waste. Not only do construction, demolition and excavation contribute about 60% of this amount, but the built environment accounts for 45% of the UK's total CO<sub>2</sub> emissions.</p> <p>Reducing waste is not enough to change this. Re-using building materials in new projects could significantly reduce the industry's carbon emissions.</p>	<p><a href="#">Harvest Map tool</a></p> <p><a href="#">The Re-Use Atlas – A designer's guide to the circular economy</a></p>
Have you used natural or recycled materials from elsewhere in the design and committed to keeping resources in circulation for longer?		
Have you outlined a future use report to specify how the building can be disassembled or materials re-used when the building reaches its end of use?		
Have you set targets to reduce your project's embodied carbon footprint and agreed on a means of measurement?		

### Design decision

Have you and your clients prioritised retrofit of existing buildings over the construction of new ones? Have you considered retrofitting/ adaptive re-use of existing buildings instead of demolition as part of the strategic planning process if applicable? Have you identified opportunities for the retention of existing buildings and recommended them to the client?

Have you undertaken a pre-demolition audit of any existing structures to determine if the building must be demolished or if there is scope for partial re-use and or at least salvage?

### Why bother?

This is ultimately the client's decision, but it is the architect's responsibility to be aware of environmental benefits and make recommendations to the client. The design team should question the need to build anything new to achieve the client brief and whether a retro-first approach can be undertaken.

Retrofitted buildings are more adaptable and suitable to existing activities or future activities.

Retrofitted buildings are more energy-efficient, and have lower carbon emissions from the building operations.

A few examples of some of the retrofit measures that help reduce resource usage and save costs in buildings:

- » Water systems designed to reduce usage and consumption
- » Replacing old lighting fixtures with energy-efficient alternatives
- » Improving ventilation systems
- » Strategic instalment of insulation

### Useful links

Arup: [Building retrofit: Transform and re-use – low carbon futures for existing buildings](#)

## Environment: Sustainable Travel

Design decision	Why bother?	Useful links
Have you identified a phased approach to reducing car parking provision over the lifetime of the building's use?	While land use induces travel, adjusting the amount of car parking to reflect social change is useful. However, the local community need to be socially ready so a phased approach can be helpful. Including this within the proposal is a key first step.	<a href="#">Department for Transport – Decarbonising Transport: A Better, Greener Britain (2021)</a>
Have you provided or funded electric vehicle (EV) charging points (on- or off-site) above policy requirements?	<p>While EV charging stations in private residences are common today, on-site commercial charging will need to become a standard building feature in the next ten years to meet consumer demand in the UK. Without upgrading buildings' electrical infrastructure, there may not be enough accessible EV chargers to satisfy the demand.</p> <p>To make EV chargers more accessible and affordable, urban planners, building developers, and electrical equipment suppliers must integrate charging infrastructure into standard building design plans.</p>	<a href="#">McKinsey &amp; Company: <u>How charging in buildings can power up the electric-vehicle industry</u></a>



## Northminster, Peterborough, Royal Haskoning DHV

### Project Team

Royal HaskoningDHV; HarrisonStevens, NORR Architects; ELG Planning

### Client

Peterborough Investment Partnership

### The Challenge:

Peterborough Investment Partnership had identified this city centre allocated site to have the potential to deliver a highly sustainable residential scheme. Local Plan policies for this part of the city prevent any “new” car parking; however, the site housed a 700-space multi-storey car park until recently, and the public consultation found deep concern regarding the loss of car parking. By contrast, the highway authority was concerned to limit the amount of car parking at the site.

### The Process

To resolve this conflict, the design team approached the problem holistically to support the ambitions for sustainable design. As a result, just 44 standard and six accessible car parking spaces were incorporated into the design for the site, and an upper bound cycle parking for the scheme was calculated which exceeded local standards. The project’s Transport Planner (Royal HaskoningDHV) and Landscape Architect (HarrisonStevens) worked together to identify an

achievable phased delivery that increased cycle parking as it decreased car parking.

### The Outcome

A parking strategy for the site has been developed:

- » The Travel Plan monitoring includes frequent monitoring of cycle parking demand. As soon as demand exceeds 95 percent capacity, additional cycle parking is to be provided.
- » This additional cycle parking is to be provided in locations identified in the landscape strategy, which reduces the number of standard car parking bays to provide new cycle parking.

The future provision of cycle parking has been considered at a very early stage and baked into the landscape strategy to support the wider public realm and connectivity improvements to be delivered by the scheme. The phased reduction of the small amount of car parking on-site will support Peterborough’s work to achieve net zero while considering the understandable concerns of local people concerning car parking provision in the immediate area. At the time of writing, the outcome of the scheme’s planning application is being awaited.





# 7. Social Value Action Plans

## Delivering the How and the What

To bring 'the How' and 'the What' to life, it is important that following a local needs analysis, engagement and a look into the heritage and identity of a community at the Preparation and Brief stage, the design team should collate a Social Value in Design Brief to specify and track which stage of the brief would be responding to which social value needs.

Along with a Social Value in Design Brief, it is useful for the design team to create a Social Value Action Plan for each project. The plan should include specific targets and a delivery plan that the contractor can agree to in the manufacturing and construction stage as well as for the occupiers and property managers to agree to in the Handover and Use stage. The Social Value Action Plan should be based on the National TOMs as a preferred methodology, but other methods might be proposed and cover the whole duration of the development.

The design team will be required to set targets and report every quarter against those targets – preferably through a Social Value Portal account for easy contract management. The Portal allows all evidence to be stored in one location, has useful live reporting and mapping of social value creation against the UN SDGs plus geo-spatially for easy comparison with other projects.

Design teams can engage with SVP to create project-specific benchmarks based on industry data and the wealth of SVP portal data and council and local community priorities.

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## Social Value Design Brief

Here's a starting point on what to think about and include in a Social Value Design Brief:

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### 1. Project Overview

**What social value are you creating through your project and why?**

- » What social value priority, problem or need are you trying to solve?
- » What social value outcomes are expected at the completion of the project?

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### 2. Goals and Objectives

**What do you and the client want to see achieved in the local community through your design? Define the overall purpose and the concrete measures.**

- » Is this the first time you are trying to address this need?
- » Are you contributing to an existing social value intervention?

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### 3. Target beneficiary

**Establish who you want to see benefiting within the community and build your targets and social value strategy around them.**

- » Who are your ideal beneficiaries?
- » What are their demographic and psychographic traits? How can you engage them in a customised way?

- » When and how will they be benefiting from your design project in their community?

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### 4. Budget & Schedule

**Understand the budget and agree the key steps and timeline with the client. The budget should be realistic and account for unexpected obstacles.**

- » What are the budget constraints?
- » What internal deadlines does the social value targets need to align with?
- » What are the key milestones?
- » Are there case studies to illustrate best approach to ensure feasibility?
- » At what stages are you reviewing social value progress throughout the project lifecycle?

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### 5. Project deliverables

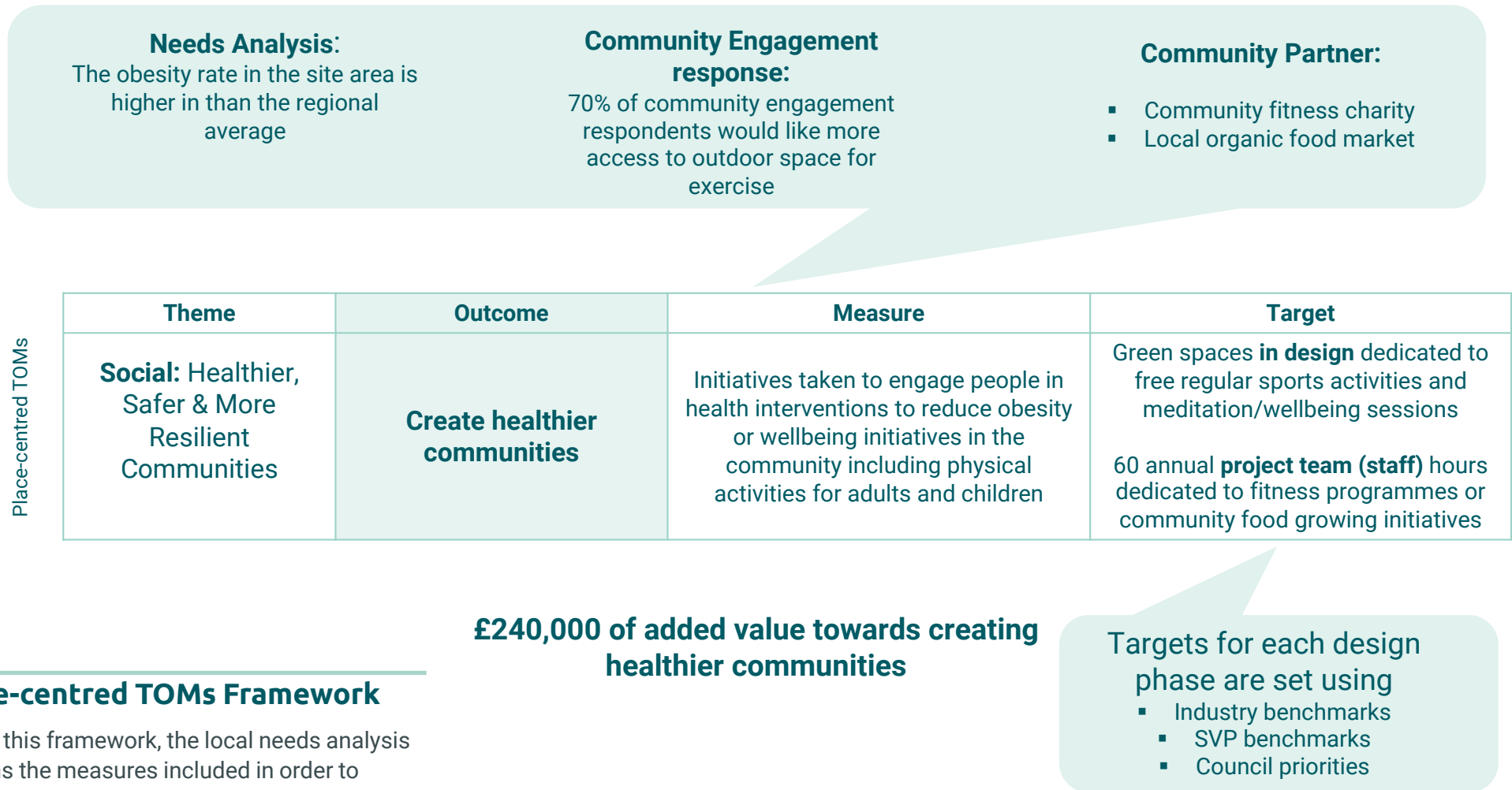
- » What do you or your client expect to establish at the end of the project?
- » How do you plan on measuring and evidencing social value created?

## Social Value Action Plan

Steps to creating a Social Value Action Plan:



**Figure 12:** Example of a Place-centred TOMs framework



### Place-centred TOMs Framework

Within this framework, the local needs analysis informs the measures included in order to maximise the impact, potential initiatives, interventions and community partners are identified to inform delivery, and finally a targets benchmarking assessment is carried out.

# 8. Conclusion

When it comes to delivering social value through design, it is important that everyone involved in the conception of a design idea to the delivery and management takes responsibility to prioritise the activities, interventions and decisions that will have the most meaningful impact for local communities.

The Social Value in Design Taskforce has collated and presented the following benefits for embedding social value in the design process:

- » It builds trust with local communities from the outset of a project
- » It enables future delivery partners to maximise their social value contributions through the construction, occupation and management of a project
- » It creates places that meet the needs of current as well as future users
- » It creates spaces that facilitate and establish agency for local communities to continue to drive social value creation

By enabling social value through both the design and delivery process i.e. 'the How' and the way in which final design output functions i.e. 'the What,' design and project teams can start to build a methodology that embeds social value at each stage of a project lifecycle while making decisions that will deliver social, economic and environmental value for the communities where they work.

As emphasised in this guidance, design teams will only be able to maximise these benefits when their clients, and stakeholders support

them to prioritise social value at each stage of the project lifecycle. However, it is also vital that design teams educate these parties and those they work with about the positive effects social value can have on a scheme and the communities it impacts. The Taskforce has compiled this guidance in order to empower design teams to leverage the opportunity that social value presents to all parties needed to make embedding social value in design standard procedure.

The importance of sharing best practice and examples of 'Inspired Design' will work to elevate the industry standard of social value in design and what it means to create places that truly benefit the local people who are using them. Our mission to integrate social value in design does not end with this guidance, we must continue to shape an industry standard and develop ways of ensuring best practice is shared and recreated

For more information on how to address the challenges that small-scale professional service providers such as architectural firms face in relation to social value in procurement and bidding for work, please see our [Professional Services TOMs and Professional Services guidance document](#).

# Appendix 1

## Social Value Plan of Work: Key Activities and Responsibilities

RIBA Design Stage	Activities	Responsibility		
		Design Team	Contractor	Client
Strategic definition	Identify key stakeholders to be included in social value consultation – reach out to local authorities during this stage to identify local social value gaps	•		•
	Define Social Value in relation to the project, which includes project team roles	•	•	•
	Look into in-house social value, i.e. how social value is delivered within a company in terms of representation of vulnerable or disadvantaged groups (EDI)	•	•	•
Preparation and briefing	Needs analysis, including policy review, IMD analysis, key issues and identification of third-sector delivery partners, as well as priorities of the LEP or County Council where relevant	•		
	Analysis of community assets, building typology or green-space needs of an area	•		
	List specific roles and responsibilities, whose social value delivery activities would fall under, i.e. client, contractor, design team or local authority, who may already have the needed local infrastructure or community knowledge and information	•	•	
	Community engagement to identify and reinforce key issues and opportunities within the community	•	•	•
	Engage with local authority and local third-sector organisations to inform community engagement strategy	•	•	•
	Agree and set design team social value targets based on the TOMs	•		•

RIBA Design Stage	Activities	Responsibility		
		Design Team	Contractor	Client
<b>Meanwhile* Uses</b>	Identify opportunities to unlock social value across the site based on feedback from the community, e.g. local initiatives or start-ups to support with site access during meanwhile use period (see <a href="#">Allia Modular Housing for Cambridge Homeless Community</a> and <a href="#">Graffiti competition</a> )	•		•
	Identify and recommend placemaking opportunities to create social value			
	Measure value created to be used as a part of planning and overall impact in terms of (£) social and local economic value	•	•	•
<b>Concept design</b>	Prioritisation of key needs and opportunities based on feedback from the community and local needs analysis	•		•
	Community engagement on concept design to understand how design is responding to social value needs in the local area (could occur during Preparation & Brief stage if public sector)	•		•
	Place-centred Social Value Measurement Framework, adapted from the TOMs	•	•	•
	Design team review and response to needs analysis with respect to design or masterplan	•		•
<b>Spatial co-ordination</b>	Social Value Assessment: how do the spaces respond to community needs	•		
	Social Value Action Plan: set targets for social value delivery throughout the project lifecycle (i.e. construction and in use)	•	•	•
<b>Planning*</b>	Social Value Statement including a needs analysis, opportunity mapping, proposed measurement framework, targets and delivery strategy	•	•	•

RIBA Design Stage	Activities	Responsibility		
		Design Team	Contractor	Client
<b>Technical design</b>	Ongoing reporting of own social value creation (own CSR initiatives specific to the project)	•	•	
	Specify social value creation through technical design decisions (e.g. local labour specifications, local building materials specifications procured to lead to carbon reduction and community connection from the design project)	•	•	
	Organise for social value updates to be included in ongoing reports	•	•	•
	Procurement strategy, including agreement of social value weightings, to be used within ITT requirements	•	•	•
<b>Manufacturing and construction</b>	Social Value Action Plans to be developed by Tier 1 contractors as well as social value design initiatives			
	Monthly or quarterly reports to showing progress against targets by the contractor and the supply chain			
	Highlight lessons learned, notable 'misses' in social value to be delivered during in-use, projects identified and engaged with, and relationships built which could be continued		•	•
<b>Handover</b>	Embed social value (at defined % weighting) in ITT and engage with bidders to ensure comprehensive social value submissions			•
	Community engagement to inform Social Value Strategy for property management procurement			•
	Design team handover which explains how design features can be used to maximise social value during the in-use phase	•	•	•
	PM Social Value Action Plans in response to the architects' community vision	•	•	•
	Community contacts	•	•	•
	Understanding feedback and impact			



RIBA Design Stage	Activities	Responsibility		
		Design Team	Contractor	Client
Use	Kick-off meeting with tenants to understand social value opportunities		•	•
	Annual surveys of occupiers to collect data			•
	Quarterly updates from property managers & suppliers – monitor progress against targets, share good practice and social value success stories		•	
	Engage with new occupiers and share successful programmes with the community		•	•
	Annual overview report, assessment of social value delivered and targets reset for the following year. See <a href="#">HLM Architects POE tool - Social Value Impact Study at St. Andrew's, Scotland</a>			•
Future use* – Re-use or Disassembly	Outlining how the development can be used in future post-lifecycle			
	Identify potential local student learning opportunities in the disassembly or change-of-use process. See <a href="#">KPF - The Bermondsey "Biscuit Factory" Project, London (Building F)</a>	•		•

\*These are stages that are not part of the RIBA Plan of Work Stages but are vital stages in the development lifecycle where social value can be embedded

# Appendix 2

## Relevant Policies

The Public Services (Social Value) Act 2012 ('Act') came into force in January 2013. It required all public bodies to look beyond the financial cost of a contract and consider how the services they commission and procure might improve the economic, social and environmental wellbeing of an area. The Act is transforming the relationship between the public and private sectors by elevating social value to sit alongside price and quality in procurement decision making, with typical stand-alone weightings at 10–20%. The Act does not apply to Northern Ireland or Scotland, or most commissioning authorities in Wales, which have parallel legislative frameworks (Well-being of Future Generations Act 2015 (Wales) and the Procurement Reform (Scotland) Act 2014). However, the principles and outcomes targeted by all three pieces of legislation are very similar.

The Act is supported by a series of policy developments including Best value statutory guidance as well as initiatives at the European level. The European Commission 2010 guidance Buying social: A guide to taking account of social considerations in public procurement is one such example.

Although the Act only applies to all 'service' contracts above the EU threshold, such as professional design or surveying services and facilities management services, government guidance encourages authorities to apply it across both services and goods above and below the threshold.

In August 2018, the Office of Civil Society published its 'Civil Society Strategy: building a future that works for everyone', which states that the UK Government is considering extending the Act's scope into the planning process.

More recently, the UK Government published Procurement Policy Note 06/20 – Taking account of social value in the award of central government contracts that set a minimum requirement of 10% social value weighting during bid evaluations for all central government contracts. This requirement includes capital projects.

### **Extract from Islington 'Local Plan Strategic and Development Management Policies', September 2019**

"A. All development in Islington is encouraged to maximise social value in order to deliver as many public benefits as possible.

B. Major development proposals must undertake a social value self-assessment which clearly sets out the specific social value which would be added through delivery of the proposal.

And...

Where social value benefits are identified which go beyond what the Council would expect as a standard level of social value on a scheme (resulting from compliance with all relevant policy requirements), this could constitute a material consideration which would add weight to a proposal."

# Appendix 3

## Key Findings – Responses from the Design Taskforce 1

### **What are the barriers to embedding social value in design from the outset?**

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- » Lack of community engagement
- » Client expectations – fear of cost
- » Lack of social value knowledge and way of measurement
- » Limited time to explore social value
- » Silo approach

### **What design choices create the most social value?**

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- » Long-term community ownership
- » Understanding local needs
- » Sustainability
- » Adaptable & flexible designs
- » Local spend & job creation

### **How can we support teams to demonstrate social value?**

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- » Case studies of good practice in design i.e. successful at creating social value
- » Clear Guidance for developers
- » Standard metrics scalable to business size



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