

SOCIAL
VALUE
TOOLKIT
FOR ARCHITECTURE



University of
Reading

RIBA 
Architecture.com

Acknowledgments

The Social Value Toolkit was conceived as a task and finish group of the Research Practice Leads, a group of people who lead on research in architectural practice and meet to discuss their research every three months <https://www.reading.ac.uk/architecture/soa-research-practice-leads-group.aspx>

Feedback

Please direct any feedback and enquiries to Flora Samuel f.b.samuel@reading.ac.uk

Original Social Value Toolkit Working Group

Hannah Brownlie (Assael Architecture), Phoebe Eustance (HTA Design LLP), Eli Hatleskog (University of Reading), Félicie Krikler (Assael Architecture), Riette Oosthuizen (HTA Design LLP), Caroline Paradise (Atkins Global), Petronella Tyson (The Collective/), Graham Randles (New Economics Foundation/Triangle Consulting), Alex Tait (Royal Institute of British Architects), Jennifer Thomas (Ministry for Housing Communities and Local Government), Flora Samuel (University of Reading, lead author and Chair of Group), Kelly Watson (Hatch Regeneris/University of Manchester).

Consulting Social Value Toolkit Working Group Members

Rachael Atkin (Fusion 21), Ben Channon (Assael Architecture), Sophia Cox (UK Green Building Council), Ijeoma Emeghe (University of Reading), Yiorgos Papamanousakis (New Economics Foundation), Anna Sullivan (HTA Design LLP), Rob Wray (HACT).

Social Value Toolkit Pilot Group and Consulting Members

Monika Baia (Proctor and Matthews), Alisdair Ben Dixon (Collective Works), Dinah Bornat (ZCD Architects), Beth Bourelly (BDP), John Cantwell (Hampshire County Council), Rachael Davidson (Hut Architecture), Holy Doron (APEC), Jeff Endean (Cast Consultancy), Ricky Evans (PAD Studio), Tom Kenny (Royal Town Planning Institute), Daniel Marmot (HHBR), Benjamin McDiarmid (Glasgow University); Sophie Morley (Architecture sans Frontières), Michael Riebel (Hawkins Brown), Clare Richards (ft' work), Tim Riley (RCKA), Hilary Satchwell (Tibbalds), Rachel Serfling (Levitt Bernstein), Katherine Thomas (Arcadia), Lesley Treacy (Turley), Maisie Tudge (Hut Architecture), Elanor Warwick (Clarion Housing Group), Alexandra Wiley (Clarion Housing Group), Helen Wilson (Clarion Housing Group), Siri Zanelli (Collective Works). Dhruv Adam Sookhoo (Metropolitan Works).

Funding

This work was supported by an institutional links grant 332241573 under the Newton-Philippines partnership, a collaboration with the School of Architecture in the University of Reading (principal investigator Flora Samuel) and the University of Santo Tomas, Manila (Co-investigator Leah dela Rosa). The grant is funded by the UK Department of Business, Energy and Industrial Strategy (BEIS) and CHED and delivered by the British Council. For further information, please visit www.newtonfund.ac.uk.

The SVT has also benefited from input from the ESRC funded UK Centre for Collaborative Housing Evidence (CACHE) www.housingevidence.ac.uk

Thanks go to Lucy Carmichael, Director of Practice at the RIBA, Caroline Buckingham RIBA Vice President of Practice and Profession and Ben Derbyshire RIBA President (2017-2019) for their unerring support.

This work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/).

RIBA and University of Reading May 2020.

Foreword

Happily, central government has elevated the importance of design quality, and ‘beauty’ has lately become an aspiration declared by Secretaries of State for Housing, Communities and Local Government. Design quality is of course to be found in more than just the appearance of buildings – it relates to the impact on people’s lives of buildings and places, in design, construction and management over the years – good or bad. The architect’s role in this is fundamental.

The Social Value Act 2012 was never specifically intended to apply to the design of places and buildings. But the act is indirectly influential in prescribing the societal benefits arising through development, as a result of government procurement provisions. In public procurement, architects increasingly come across the need to demonstrate Social Value on their projects – although the focus until now has been very much on the process of development; on, for example, the jobs created during construction. But our concern should be for long term outcomes of certain design decisions that deliver lasting human wellbeing.

Architects do little to obtain feedback on the outcomes of their work and are shockingly ignorant of the impact they have on communities. As a result, it is virtually impossible to predict or explain the positive societal impact of their contribution to buildings, homes and places.

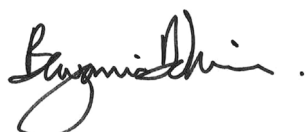
Social value, as a rule, previously hasn’t been viewed as a return on real estate investment or as a measure of progress during different stages of a project. However, it would have significant impact if only it was better understood. Instead, economic viability has dominated planning negotiations and development outcomes; not always resulting in lasting quality or sustainable wider societal benefit. There has been a rather impoverished notion that Section 106 monies should be used to ‘mitigate the negative impacts of development’. However, the long term good (or not) deriving from development is not judged by the consumers of construction projects and neither is it sought or understood by developers and their consultants in any meaningful process of research and feedback.

But in a world where there is an increasing realisation that the funding streams for the provision of homes, the health-care system and protecting the environment should be fundamentally aligned to ensure the best outcomes for long term sustainability. Accordingly, built environment professionals need to up their game in understanding their role in delivering predictably and positively on these important societal issues. What value can and do they add?

The Social Value Toolkit for Architecture has been developed to make it simple to demonstrate and evaluate the impact of design on people and communities, outcomes that are increasingly considered as social value benefits in public policy and procurement. This RIBA source book understands social value to be much broader than the social capital of a place but rather the holistic social, environmental and economic benefits to society.

The toolkit presents a library of questions for practitioners to use in the duration of projects and to revisit them once built. The questions are based on assessing existing research on key indicators of wellbeing. It argues that the social value of architecture is revealed in the extent to which it fosters positive emotions. This can be through connections with nature, offering opportunities for an active lifestyle, connecting people and the environment in appropriate ways, providing freedom and flexibility to pursue different lifestyles without conflict and the ability to participate.

I am delighted to see RIBA launch this toolkit for architects to use on their projects. It is open source and presents a library of ideas that can be individually tailored to assess the impact of projects on people and increase shared learning in a wide range of circumstances.



Ben Derbyshire

RIBA President 2017-19

Contents

Introduction	6
Social value and the built environment	7
<i>Félicie Krikler on why social value is important to Assael Architecture</i>	8
Why monetise outcomes?	9
<i>Riette Oosthuizen on why social value is important to HTA Design LLP</i>	10
Developing a social value survey	11
<i>Caroline Paradise on why social value is important to Atkins</i>	13
Library of Social Value Toolkit POE questions	14
<i>Beth Bourrelly on why social value is important to BDP</i>	16
Social Value Toolkit for the monetisation of housing outcomes	17
<i>Alasdair Ben Dixon on why social value is important to Collective Works</i>	20
The development of the Social Value Toolkit for Architecture	21
Bibliography	22
Appendix – Exemplar ethics information and consent form	23

“If we cannot define what we mean by value, we cannot be sure to produce it, nor to share it fairly, nor to sustain economic growth.”

(Mazzucato, 2018, p. xix)

Introduction

The Social Value Toolkit (SVT) for Architecture has been developed to make it simple to demonstrate and evaluate the impact of design on people and communities. These outcomes are increasingly being considered as social value benefits in public policy and procurement, as well as in the quality scores of bids and tenders. Underlying the SVT is a pragmatism about the need to demonstrate value quantitatively in a culture of key performance targets and metrics (Trowers & Hamblins, 2017). There is much work to be done by the architecture community on refining processes needed to capture and learn about the impact of design on wellbeing (Samuel, 2018).

The SVT seeks to define and capture the social value of architecture and good design, for housing. Whilst others in the built environment generally place emphasis on the process, the creation of jobs and apprenticeships, the SVT places emphasis on the social value of the product – the building or the place.

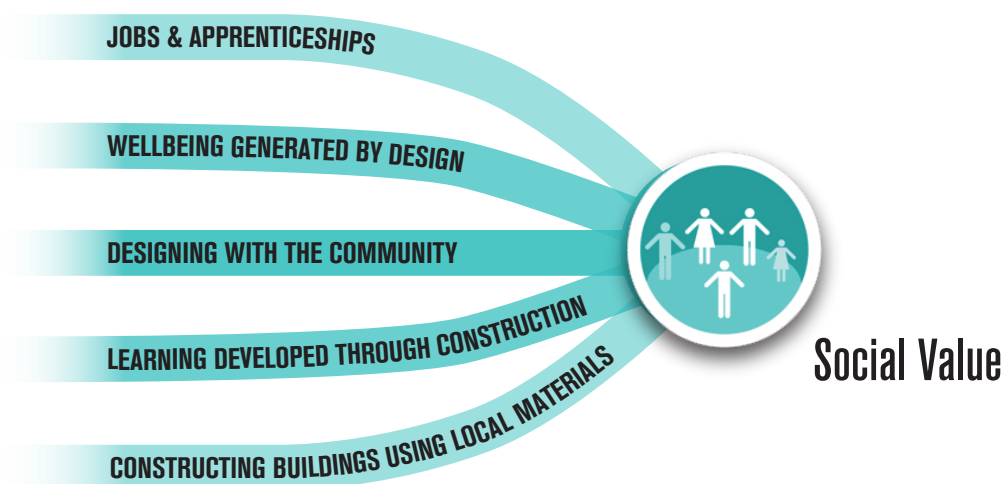
Based on an extensive review of wellbeing literature we argue that the social value of architecture is in fostering **positive emotions**, whether through connections with nature or offering opportunities for an active lifestyle, **connecting** people and the environment in appropriate ways and in providing **freedom and flexibility** to pursue different lifestyles (autonomy). There is also social value in **participation**, supporting communities to help design and build their homes and neighbourhoods. This version of the SVT focuses on the social value benefits of housing design, but these qualities are also applicable to other building typologies.

The SVT is a bottom-up initiative developed by a group of UK researchers in architecture practices (notably Assael Architecture, Atkins and HTA Design LLP) with the University of Reading, Arup, New Economics Foundation, Hatch Regeneris, Triangle Consulting and MHCLG. The evaluation of intangible impacts is a neglected area within post occupancy evaluation, itself a neglected field (Hay et al., 2017). The recently published *RIBA Sustainable Outcomes Guide* provides an important step in ameliorating this situation as it defines a series of measurable outcomes for architecture including social value (Clark, 2019).

Having set the context for social value in the built environment and the benefits of monetising of social value outcomes we will give a simple description of the SVT and its use in practice. It is important that quantitative information should always be accompanied by narrative to give a balanced account of impact. The SVT has two parts:

- A library of post occupancy evaluation questions developed out of wellbeing research and considerable consultation.
- A monetisation tool that can be used as a clip on to other post occupancy evaluation processes, particularly questionnaires such as the Arup Building User Survey (BUS)

The document also includes perspectives from some of the practitioners involved in making this document on why architects need to be considering social value in their work. The document finishes with an account of how the SVT came into being. Exemplar ethics forms for use in surveys and interviews are included in the appendices to help practices collect data in a robust and transparent. These need fine tuning based on the situation in which they are used. There is much work to be done to support practices in their data gathering activities. As this is the first time an SVT has been made for architecture it is bound to need refining so please send us feedback on your experiences of using it.



Dimensions of social value in the context of the built environment



Across the globe architects are switching on to the importance of demonstrating their social value in qualitative and quantitative terms (Samuel and Hatleskog, 2020). Since the advent of the Social Value Act 2012 in England, Social Value has been gaining traction as a requirement of procurement, contracts and planning in the public sector (UKGBC, 2019). There is however growing consensus on the wellbeing impact of design and placemaking (Design Council, 2018), particularly now that social prescribing is becoming such an integral part of NHS activity (NHS England, 2018). Organisations such as HACT have been developing social value proxies for use by housing associations and local authorities to collect information on their portfolios, but until now no toolkits have been developed specifically to capture the social value of design. The rise of social value on the policy agenda is a real opportunity for architects to demonstrate the value of what they do. The social value generated through construction and the supply chain has long been a concern of the construction industry. The way in which social value is framed in bids often favours construction and engineering firms. It is high time that architects recognise the social value lifecycle implications of their design and specification choices and make them heard.

Design value is widely accepted to be the sum of environmental value, economic value and social value (Serin et al., 2018), in other words the commonly used triple bottom line of sustainability. These are the basis for the methods currently advised in *HM Treasury Green Book* (UKGov, 2018) guidance, the means by which the UK government assesses cost benefits in appraisal and evaluation processes. Whilst environmental value is often measured in operational energy and embodied carbon, sometimes with the addition of biodiversity and air quality, and there are existing practices for measuring economic value, the measurement of social value requires definition¹.

There are a variety of existing systems for capturing social value – the National Themes, Outcomes and Measures (TOMs) Framework is increasingly being used by local authorities for procurement and now includes a Real Estate Plug-in. (TOMs, 2019). HACT's Social Value Bank is another example that we draw upon extensively (HACT, 2015). A key aim of the SVT is in helping architects to navigate the social value terrain, making the best of existing systems.

The BRE is currently working on the development of a procurement tool that integrates multiple measures of value including social value as part of the Procuring for Value initiative by the Construction Industry Council (Bentley, 2018). In an increasingly data driven environment we have to find ways to capture intangible impacts or they will not figure in digital twin city models, BIM or outcome based procurement. A multitude of tools are emerging to assist with this process (see for example Common Place, 2019; New Economy, 2019). It is perhaps better for architecture to create its own tool than for the field to have a tool thrust upon it, or worse to be marginalized from the debate altogether for want of leadership in this area. The UK Green Building Council is currently doing important work in developing a shared framework for use across the sector.

We hope that this brief introduction to the practices of social value post occupancy evaluation and social return on investment will inspire practices to make robust responses to calls for social value data while learning about the effectiveness of their designs in making great places for people to live and work.

¹ In another widely used definition of sustainability the 'Five Capitals' model there are sections for social, human, natural, physical and economic capital (Forum for the Future, 2019). Social capital relates more to institutions and human capital relates to issues around individual wellbeing.



Félicie Krikler, on why social value is important to Assael Architecture



Félicie Krikler, Assael Architecture

We most often come across the notion of ‘social value’ through procurement, when we are asked to demonstrate how we create social value through our working methods and over the lifetime of a project. However, we believe that our influence would be able to reach much further by creating long-term social value through our design decisions and outputs.

Being able to evaluate and understand how we contribute towards long-term social value creation will be an incredibly useful tool internally, to learn from previous projects and inform future projects. Coupled with effective Post Occupancy Evaluation, it will add a layer of human experience to our buildings, which we can often feel remote from if only dealing with a client or contractor.

In addition to this, we are anticipating using these evaluations to feed back into the procurement process, to enable us to demonstrate our involvement towards providing social value in construction but also for the long-term through good design.

“
Being able to evaluate and understand how we contribute towards long-term social value creation will be an incredibly useful tool internally.
”

Why monetise outcomes?



We live in a society governed by audit culture. This means we have to monetise outcomes to enable architects to express their work in way that aligns with the business practices of clients and the reporting practices of policy. Architects often complain that they have lost control of the project due to contractor led procurement and that any design quality in their scheme was diluted through value engineering. This may be because they have lacked a means of expressing their worth in terms that others can understand (Samuel, 2018). If the value of design can be monetised it can more readily be included in valuations (see the RICS Red Book, 2019 for more detail on valuation practices). Valuers need to take a more pro-active stance in promoting sustainability across the chain from the initial interface with clients to final reporting (Sayce, 2018). Monetisation will also help the translation of design into other brand enhancing kitemarks of increasing importance to clients interested in the greening of industry and Corporate Social Responsibility, such as Great Places to Work.

The recent appearance of an emergent, but diffuse, field of 'green real estate finance' and the development of a 'green value proposition' (Dalton and Fuerst, 2018) should be noted. There is potential for social value to be used to drive socially desirable planning contributions such as Section 106 agreements (Section 75 in Scotland), allowing design value to be built into every project, rather than treated as an add-on or afterthought to comply with planning conditions. There is also potential for the development of Social Value Bonds as a means to secure necessary finance. None of this will happen without the development of solid evidence of value (Sayce, 2018), something that is lacking across the entire design and construction industry.

What is needed is a methodology for translating the social value of design into a format that can be used in economic models. It is here that Social Return on Investment (SROI), the use of financial proxies (developed over many years using data from major UK surveys) comes in handy (Watson and Whitley, 2016). In the UK SROI is widely used. It is the methodology that underpins the HACT Social Value Bank, National TOMs Framework and other bespoke value transfer toolkits. The SROI methodology can be a resource intensive, project specific process, or as in the case of the SVT, it can be used to develop high level indicators and metrics. With their increased use, financial proxies are being refined, with a growing body of research aiming to reduce the social performance gap.

Advances in technology, for example the use of mobile phone data, mean that the gathering of social data is likely to speed up very soon. It won't be long before social data is captured spatially on maps, as the Mapping Eco Social Assets project has done at the University of Reading. This in turn will lead to the inclusion of social value in land valuation and strategic planning. Whilst the monetising of design might be distasteful to many practitioners it is offered here as a provocation to practices to think about the potential impact of data on the profession going forward.



Social Value map developed by the Mapping Eco Social Assets project at the University of Reading.



Riette Oosthuizen on why social value is important to HTA Design LLP



Riette Oosthuizen Planning Partner, HTA Design LLP

HTA Design, a practice with 50 years' experience in housing and housing led regeneration, has made a commitment to incorporate social value led Post Occupancy Evaluation on all our projects. Celebrating our 50th year in 2019 has provided us time to reflect on the work we have done over the years. We have set ourselves the following objectives:

- We want to assess how the built fabric of the places we designed performs over time;
- We want to know more about the link between place and well-being from residents' perspective; and,
- We want to build up a qualitative evidence base in relation to aspects of design that could be used to negotiate future design choices with our clients.

HTA took part in the discussions that led to the development of the Social Value Toolkit for Architects from its inception and we trialled the questions enclosed in the toolkit on a range of our projects. We tailored the questions to our own in-house methodology for revisiting projects. Our methodology comprises:

- An observational visit, with specific questions posed to the researcher relating to the place (with a photographic record assisting an initial visit);
- A door knocking exercise, asking the simple question 'what is it like to live here?';
- A list of questions that could be used during a more in-depth focus group with up to 10 residents; and,
- A questionnaire that could be e-mailed to all residents based broadly on the questions enclosed in the Social Value toolkit, plus additional questions on air/light, comfort and flexibility of space.

We have found in most cases three or more visits to a place necessary. We are currently exploring how to extend a social value driven exercise of post occupancy evaluation with the more technical aspects of building performance.

“
HTA design has made a commitment to incorporate social value led Post Occupancy Evaluation on all our projects.
”

Developing a social value survey



This document includes a library of possible questions for gathering of data on social value and sets out a series of steps necessary for gathering monetized data. Before using the toolkit it is important to reflect on your audience and the kind of data that they need. The SVT can also be used internally to evaluate the impact of design decisions that your practice is making. The SROI monetisation should only be used in conjunction with other more qualitative POE processes and needs to be used with discrimination.

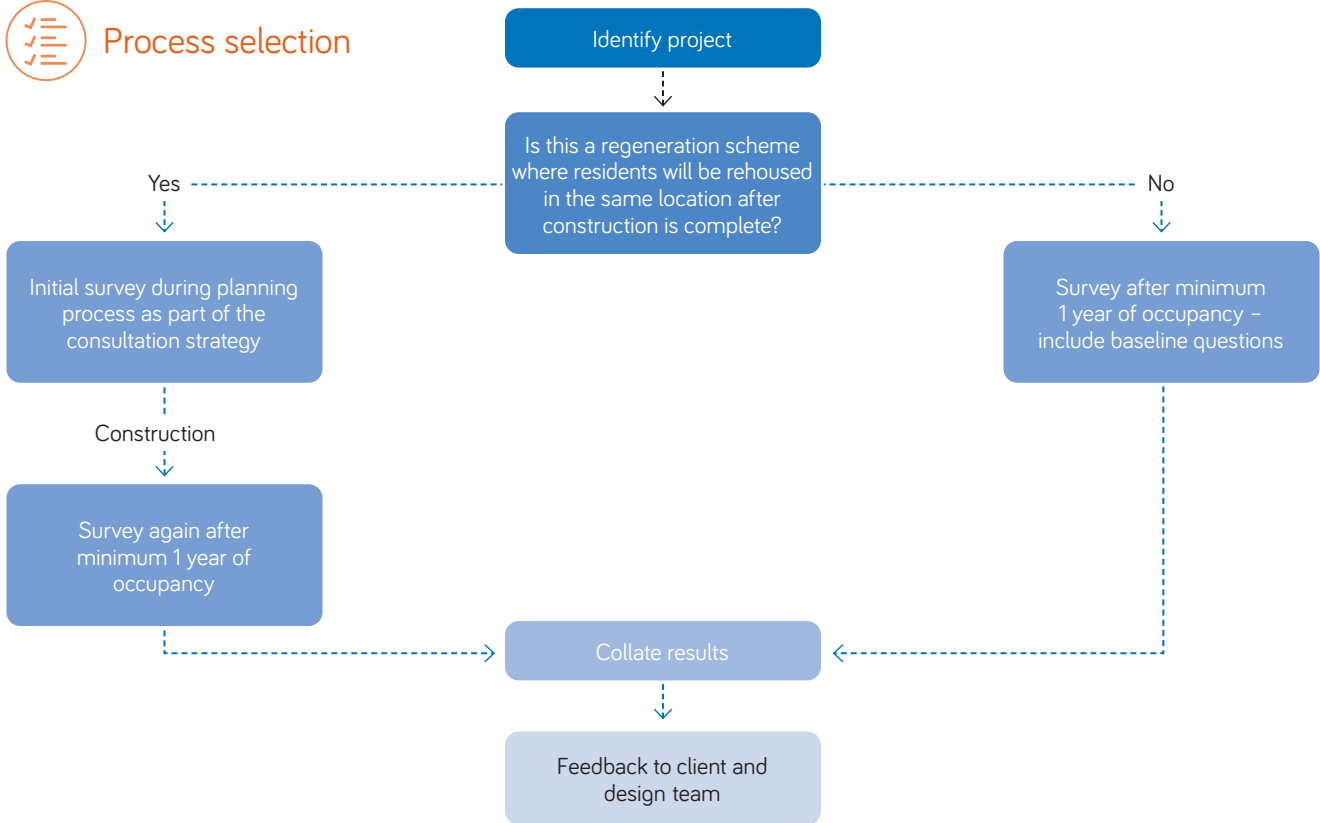
Public consultation takes time. The robustness of the evidence developed depends very much on the care taken in developing survey techniques, as well as links to the client and community. Practices should consider employing consultants to give an objective view of the value produced.

Before embarking on any consultation it is also important to give consideration to ethics (KNOW, 2018; RIBA, 2018). This is done by giving participant: adequate information on the project to understand what it entails; how the information will be used and how their data will be protected and by obtaining proof of their informed consent. This usually takes the form of a project information sheet accompanied by a consent form (an example used for the development of the SVT pilot is included in the appendices at the back of this publication).

Ideally social value should be monitored before and after the design intervention so the extent of change can be ascertained. Where it is not possible to identify a baseline, it is necessary to find another way to work out how much of the social value can be attributed to changes made. This can be done through the inclusion of questions about the extent to which respondents feel that the change has come about as a result of the building project. To ensure that the findings represent the diversity of society and/or the neighbourhood it may be necessary to add demographic questions to check you are getting the right coverage. There are many good guides to research that can help you with this (see for example Ritchie et al., 2013). Generally, it is best to keep the number of questions to a minimum. We tested the SVT in focus groups, on line surveys, community events and through doorstep interviews. It is important to offer a variety of formats to ensure that nobody is excluded from the process.



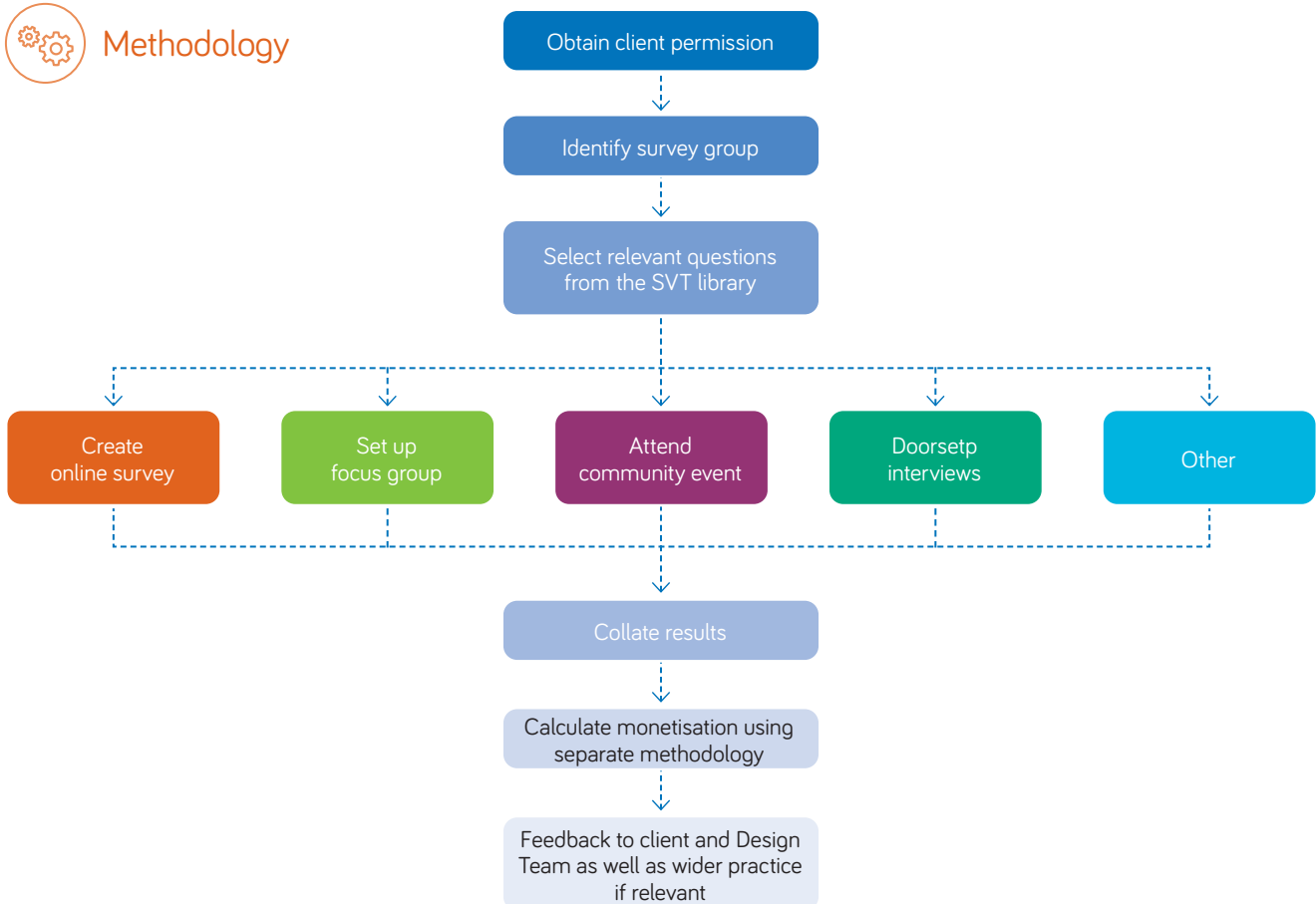
Process selection



Identify the Social Value reporting path



Methodology



Undertaking a Social Value analysis



Caroline Paradise on why social value is important to Atkins



Caroline Paradise, Head of Research, Atkins

Social Value has long been an important part of our philosophy at Atkins. We take a holistic approach to the challenges and opportunities of providing true value to those communities, considering the social, environmental and economic impact of placemaking, our teams including town planners, economists as well as urban designers, engineers and architects. As a practice with offices across the UK we support the design and delivery of a wide range of social infrastructure, all our teams appreciate the impact they can have on the social, environment and economic health of people who live and work in these places. We encourage our teams to put those people first, using their skills and expertise for the benefit of the local communities they are designing for. Starting from a position of social value is part of our DNA.

We believe that if everyone working in the built environment, not just architects, design more socially conscious places, we can make a real impact. The Social Value Toolkit will help us to push to do 'things better and differently' and demonstrate that the RIBA is listening and engaging with today's society to promote the true Social Value of design and placemaking.

“
We believe that if everyone working in the built environment, not just architects, design more socially conscious places, we can make a real impact.
”



Library of Social Value Toolkit

post occupancy evaluation questions

A review of the literature of wellbeing reveals considerable consensus on the social value outcomes delivered by good places. We define these as: positive emotions; connecting; freedom and flexibility; and participation.

These questions have been developed for use in housing but can be adapted to other settings, for example workplaces, schools and universities. A place to give qualitative responses should be included in every case as quantitative responses alone will not give a rich enough picture for any meaningful learning (Crossick and Kaszynska, 2016). We ask respondents to give their level of agreement, but a sliding scale could equally well be used.

Opening question

Do you think your neighbourhood is a good place to live?

Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree/Not Applicable

1. Positive emotions

- a. i) I feel a sense of pride about this neighbourhood/building
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree
 - ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- b. i) I feel safe in my neighbourhood.
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree
 - ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- c. i) I feel that the design of my home (and/or its environment) lifts my spirits.
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree
 - ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- d. i) I feel I have a physically active lifestyle in this neighbourhood [this can include a light walk, gardening].
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree
 - ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

How much of this is due to the design or other factors e.g. people? [0-10 or slider]

2. Connecting

(the questions need to be tailored to suit different sectors – flats, buildings, neighbourhoods, city or rural setting)

- a. i) My neighbourhood gives me opportunities to stop and communicate with people regularly.
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
 - ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- b. i) I feel a sense of responsibility for where I live.
Strongly Agree/Agree/ Disagree/Strongly Disagree
 - ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- c. i) People look out for each other here.
Strongly Agree/Agree/ Disagree/Strongly Disagree
 - ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

- d. i) My neighbourhood gives me opportunity to connect with nature.
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree
- ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

How much of this is due to the design or other factors e.g. people? [0-10 or slider]

3. Freedom and flexibility

- a. i) I feel it is safe for children to play outside.
Strongly Agree/Agree/Neutral/ Disagree/Strongly Disagree
- ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- b. i) I feel my home gives me adequate privacy.
Strongly Agree/Agree/Neutral/ Disagree/Strongly Disagree
- ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- c. i) I am not disturbed by noise from neighbours and the outside.
Strongly Agree/Agree/Neutral/ Disagree/Strongly Disagree
- ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- d. i) I feel able to adapt my home to my needs.
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree
- ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

How much of this is due to the design or other factors e.g. people? [0-10 or slider]

4. Participation

(to be used if the community has been involved in the development of the project)

- a. i) I feel I have a say in my neighbourhood.
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree
- ii) Please rate the same statement for before you moved here/the refurbishment/the changes to the building
Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree
- b. The design process gave me the opportunity to learn new things.
Strongly Agree/Agree/ Neutral/Disagree/Strongly Disagree/Not Applicable
- c. The design process helped me to develop relationships with others in my neighbourhood
Strongly Agree/Agree/ Disagree/Strongly Disagree/NA
- d. Being involved in the design process makes me care about my neighbourhood more.
Strongly Agree/Agree/ Disagree/Strongly Disagree/NA

Any other comments?



Beth Bourrelly on why social value is important to BDP



Beth Bourrelly, Architect Associate, BDP

The ethos of BDP lies in a collaborative, people-focused culture with a shared aim to value each other and the communities we work within.

BDP supports their community within, through increased diversity and inclusion, mentorship training, champions support, trained Mental Health First Aiders, establishing apprenticeship programmes and working closely with Islington's stated aim to become the first living wage borough in England. It also supports its community externally via mentorship initiatives, education assistance, STEM ambassadors and charity support. All with external benchmarking to track and record progress.

Within the built projects BDP completes, understanding the long term 'Social Value Added' is very important. In post occupancy evaluation, the idea that project metrics could be analysed through a model such as the Social Value Toolkit to identify and 'monetize' the added social value is of great benefit when reporting on performance to existing and potential clients. Additionally, and as importantly, the feedback can help to inform ways BDP can continually improve on projects' overall contribution to their community through their design.

“
Understanding the long
term 'Social Value Added'
is very important.
”

Social Value Toolkit for the monetisation of housing outcomes



In order to monetise the social value of housing outcomes the SVT draws on a range of existing proxies with relevance for housing design. The SVT contains a set of core questions, the results of which are monetised to show the value that accrues to end users as a result of those particular outcomes. The approach for monetising social outcomes is based on Social Return on Investment (SROI). In-depth guidance on SROI is available [here](#), and it is endorsed by the Cabinet Office.

Social impact can be quantified in several ways:

1. Value for money: Willingness to pay extra for something you value.
2. Time is money: The value of saving time.
3. Subjective Wellbeing valuation: Putting a value on wellbeing – most appropriate to understanding the impact of design on end users.

The HACT Social Value Bank is a useful, open access [source](#) that contains a series of values based on subjective wellbeing valuation. Subjective wellbeing valuations are average monetised values of change in wellbeing. They can be interpreted as the average value of the change in wellbeing associated with the change in the outcome. Examples of financial proxies of social value from the HACT Social Value Bank are shown below and full guidance on using the Social Value Bank can be accessed at:

<https://www.hact.org.uk/measuring-social-impact-community-investment-guide-using-wellbeing-valuation-approach>

Outcome		HACT Social Value Bank financial proxy 2019	Deadweight
Positive Emotions	I feel in control of my life	£15,894	0.27
Connecting	I talk to neighbours regularly	£4,511	0.19
Positive Emotions	I feel a sense of belonging in my neighbourhood	£3,753	0.19
Positive Emotions	I am able to take frequent mild exercise	£3,537	0.19
Participation	I am active in a tenants group	£8,116	0.19
Positive Emotions	I feel relief from depression/anxiety	£36,766	0.27

Examples of social value proxies from the Social Value Bank

Subjective wellbeing values provide a methodology for quantifying how people value non-market goods. For example, the value that accrues to an individual as a result of increased social interaction, or from living next to open spaces. These things are important but are not commonly expressed or measured in monetary values. The most up-to-date version of the Social Value Bank should be used (the current version is 4.0). It is important to refer to the Social Value Bank website which includes in-depth guidance on applying the approach, including which proxies should not be used together to avoid double counting. This methodology also accounts for deadweight (i.e. what would have been achieved anyway, regardless of the intervention), and the deadweight proportions for each outcome are included in the Social Value Bank.

The SVT also includes questions about attribution, (i.e. how much of the outcome can be attributed to the intervention you want to evaluate, in this case design, as opposed to other factors). These questions are rated on a 0 – 10 scale and should be included in the survey and analysed as outlined below. Note that deadweight and attribution are two different counterfactual measures, and both should be considered in these calculations.

The most appropriate values in the Social Value Bank have been pulled out to allow the monetisation of the core questions in the SVT.

This approach should only be applied to impacts experienced by adults (over 18s), and therefore is likely an underestimation of the total impact being generated by design.

The following 6 steps should be taken to determine social value.

- 1 Once the SVT questions have been used as part of a POE survey, the results should be analysed to produce a series of average scores between 0 and 1.0 for each question (i.e. the mean average across all respondents, or each respondent group of interest).

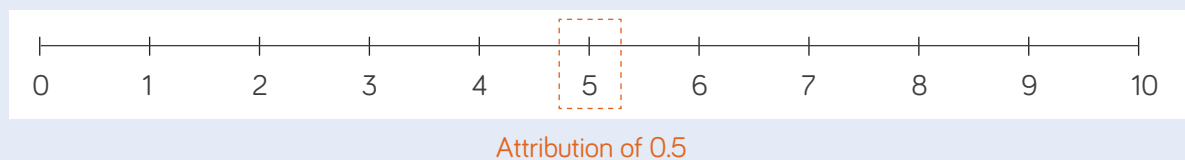
For example, if you are using the Strongly agree, Agree etc for your survey responses, you would calculate the average scores, using the numbers below. So if the average answer for a question from a particular respondent group was neither agree nor disagree, then the average score for that group would be 0.

Strongly disagree	—————>	-1.0	
Disagree	—————>	-0.5	
Neither agree nor disagree	—————>	0	Average score
Agree	—————>	0.5	
Strongly agree	—————>	1.0	

- 2 The attribution questions should also be analysed to produce an average score for each question, between 0 and 10.

It is advised that when you carry out your survey, the attribution question is included in the survey as a slider bar between 0 and 10.

For example: using the question. How much do you feel your responses in this section are due to the design (rather than other factors)?



- 3 Multiply the average score for each outcome against the social value proxy for that outcome, against the total number of people that are impacted to produce the impact figure. For a worked example, see below:

$$\begin{array}{ccccccc} \mathbf{0.38} & & \mathbf{£4,511} & & \mathbf{500} & = & \mathbf{£857,090} \\ \text{(average score} & \times & \text{(social value} & \times & \text{(no. of people} & & \text{(Impact figure)} \\ \text{for question} & & \text{proxy)} & & \text{living in that} & & \\ \text{e.g 'I talk to} & & & & \text{housing} & & \\ \text{neighbours} & & & & \text{development)} & & \\ \text{regularly)} & & & & & & \end{array}$$

- 4 Apply the deadweight proportion that is found in the Social Value Bank, linked to that social value proxy.

$$\begin{array}{ccc} \text{£857,090} & \times & \text{0.81} \\ \text{(Impact figure)} & & \text{(Deadweight is 0.19} \\ & & \text{for this outcome)} \\ \hline & = & \text{£694,243} \\ & & \text{(Impact figure} \\ & & \text{minus deadweight)} \end{array}$$

- 5 Apply the attribution proportion that has been calculated (see step 2)

$$\begin{array}{ccc} \text{£694,243} & \times & \text{0.5} \\ \text{(Impact figure minus} & & \text{(Attribution)} \\ \text{deadweight)} & & \\ \hline & = & \text{£347,121} \\ & & \text{(Impact figure} \\ & & \text{minus deadweight} \\ & & \text{and attribution)} \end{array}$$

- 6 The deadweight- and attribution-adjusted impact figure can be projected across the expected lifetime of the development, using standard discounting rates. Discounting rates can be taken from the HM Green Book (2018), 3.5% for 30 years, 3% for 31-75, and 2.5% for 76-125 years.

Common terminology as defined by The Guide to Social Return on Investment, 2012:

Deadweight

Deadweight is a measure of the proportion of the outcome that would have happened even if the activity had not taken place. It is calculated as a percentage. For example, an evaluation of a regeneration programme found that there has been a 7% increase in economic activity in the area since the programme began. However, the national economy grew by 5% during this time. Researchers would need to investigate how much of the local economic growth was due to wider economic changes and how much to the specific intervention being analysed. As deadweight increases, your contribution to the outcome declines. When deadweight is high this may mean that the outcome is no longer material to your analysis. Deadweight is measured as a percentage that is deducted from the outcome is deducted from the total quantity of the outcome.

Attribution

Attribution is an assessment of how much of the outcome was caused by factors other than the current activity or intervention. Attribution is calculated as a percentage (i.e. the proportion of the outcome that is attributable to your organisation). For example, alongside a new cycling initiative there is a decrease in carbon emissions in a borough. However, at the same time, a congestion charge and an environmental awareness programme began. While the cycling initiative knows that it has contributed because of the number of motorists that have switched to cycling, it will need to determine what share of the reduced emissions it can claim and how much is down to the other initiatives.

The full guidance on using SROI is available at [The Guide to SROI](#) and a fuller description of applying an SROI-based methodology to monetise the impact of design can be found in [Watson and Whitley \(2017\)](#).



Alasdair Ben Dixon on why social value is important to Collective Works



Alasdair Ben Dixon, Partner, Collective Works LLP

As a small practice passionate about social sustainability we're excited to see increased recognition of social value across the industry. The reasons for our enthusiasm are two-fold. On the one hand it helps improve outcomes for communities impacted by development. On the other it helps architects better understand and capture fewer tangible impacts.

We were therefore keen to assist the Social Value Toolkit pilot by taking part in consultations at Guerrilla Tactics in November 2018 before joining the working group in early 2019.

At the time we were in the midst of a small project for Highgate Primary, so although other practices were focussed on housing, we decided to test it in education. The site was an underutilised corner of the playground which the headteacher wanted to use for formal learning as well as informal play. The initial stages involved a child-led ideas workshop and a crowdfunding event to raise the required budget. Now complete the 65sqm space means 80 children have access to an inspiring outdoor learning space.

To adapt the toolkit for use in this context we removed questions relating to privacy and neighbours, broadened some of the questions related to environment and added some questions relating to learning and informal play.

Having circulated the questionnaire, we received plenty of quantitative feedback on observed improvements brought by the project. We also learnt that the client really appreciated the chance to reflect on the project's broader impact. We also received plenty of verbal feedback from the children, who thankfully welcomed the new structure.

With a base set of data on the project at completion our next step will be to return in 6 months to canvas more views on the same project in use. We're also planning to run the toolkit on another nursery refurbishment in Hackney.

It's fair to say that trialling the toolkit helped improve our relationship with the client and allowed us to critically reflect on the impact of the project. Whilst this project would have been below the threshold for Social Value in public sector work, we'll continue to use the toolkit as the data can still support bids for future work, especially as clients begin to demand more evidence-based outcomes.

“

As a small practice passionate about social sustainability we're excited to see increased recognition of social value across the industry.

”



The development of the Social Value Toolkit for Architecture

The SVT is the result of a task and finish group conceived by the Research Practice Leads, an interdisciplinary London based group of professionals who lead on research within architectural practice. The need for a pragmatic tool to demonstrate social value was felt to be urgent particularly by those responsible for developing project bids who were regularly confronted with questions about social value. The SVT methodology has been tested spatially as maps through community consultation in the Orts Road Estate in Reading as part of the Newton Funded Mapping Eco Social Assets project.

The development of the SVT (an exercise in Participatory Action Research) began with a small symposium at the offices of HTA Design LLP in the summer of 2018 at which a series of invited speakers – Graham Randles (NEF), Jennifer Thomas (MHCLG), Kelly Watson (ARUP, since joined Hatch Regeneris) presented the latest industry knowledge in this area. This group joined the working group on the development of the tool.

The first step was to develop a matrix of high level wellbeing outcomes reported across a range of grey literature documents, for example the excellent review of reviews *Waterways and Wellbeing* (Canal and River Trust, 2017). Significant commonality was identified across the outcomes, then separated only using terminology. A selection of high-level outcomes was developed for the SVT based on this review. They are closely linked to the New Economics Foundation's Five Ways to Wellbeing. These have morphed and been reordered through further testing as the project progressed

1. Positive Emotions
2. Connecting
3. Freedom and flexibility

With additional questions relating to Participation, where relevant.

The next step was to develop a series of three questions to underpin each headline outcome. This was done not only by the working group but in separate consultations with small practitioners at the RIBA Guerilla Tactics conference 2018 and in a workshop with MArch students working on social value with Mhairi McVicar at the Welsh School of Architecture. Again, there was an extraordinary level of consensus across these three diverse constituencies.

A set of underpinning questions was developed that were then piloted across five practices (Assael Architecture, BDP, Collective Works, HTA Design LLP) in very diverse circumstances (observation, focus groups, surveys, interviews, public consultations). A range of other practices were consulted during the pilot phase, but some had difficulty securing permission to undertake the survey within the timeframe. The pilot phase was useful particularly identifying redundant questions and unintelligible language. Questions that had been included on energy and cost of maintenance felt irrelevant to tenants within social housing. It became apparent that there was no point in asking questions with easily quantifiable outcomes covered already by existing POE systems. One practice had used the questionnaire with a Head Mistress of a School who found that the questions allowed her to talk about things that she had not felt were part of discussions of architecture. The pilot group agreed that a library of POE questions should be developed, subdivided by sector and by scale.

In parallel to this process Kelly Watson and Graham Randles did an exercise in identifying existing financial proxies that could be used to monetise the desired outcomes of the SVT. It is possible to commission new financial proxies which are built on existing data sets such as the Household Panel Survey but this can be a lengthy and expensive process. They identified a series of clear and tested financial proxies.

When the findings of the two strands came together it was agreed that the set of questions linked to financial proxies should be used as an SROI-based tool that can clip on to other POE systems and that the other questions (without immediate monetisation opportunities) should be included in the SVT as a library of questions for practices to use to prompt qualitative responses as needed. Hence the two parts to the toolkit.

It is hoped that the SVT will provide a practical tool for concrete discussions about the value of architectural design with non-architects. As it is the first tool of its kind it will inevitably need refining. Our aspiration is to develop the toolkit as a digital platform and to commission new financial proxies specific to architecture. Please send any feedback on your experience of using the tool to Flora Samuel at the University of Reading.



- Bentley, A., 2018. *Procuring for Value*. CIC.
- Canal and River Trust, 2017. *Waterways and Wellbeing: Building the Evidence Base*. Canal and River Trust, London.
- Clark, G., 2019. *RIBA Sustainable Outcomes*. RIBA [WWW Document]
URL <https://www.architecture.com/knowledge-and-resources/resources-landing-page/sustainable-outcomes-guide>
- Common Place, 2019. CommonPlace [WWW Document]. URL <https://www.commonplace.is/>
- Crane, H., 2019. *Redrow tool reveals schemes' social value*. Propertyweek.com 18 January, 21.
- Crossick, G., Kaszynska, P., 2016. *Understanding the value of arts & culture* | The AHRC Cultural Value Project – <http://www.ahrc.ac.uk/documents/publications/cultural-value-project-final-report/>. AHRC.
- Dalton, B., Fuerst, F., 2018. *The “green” value proposition in real estate: A meta-analysis*, in: Wilkinson, S., Dixon, T., Sayce, S., Miller, N. (Eds.), *Routledge Handbook of Sustainable Real Estate*. Routledge, London, pp. 177–200.
- Design Council, 2018. *Healthy Placemaking*. Design Council/Social Change UK, London.
- HACT, 2015. *Procurement and Social Value*. [WWW Document]
URL <https://www.hact.org.uk/sites/default/files/uploads/Archives/2015/9/Procurement%20and%20Social%20Value%20-%20A%20white%20paper%20for%20Wandle%20LOGOS.pdf>
- HACT 2020. *Social Value Bank* [WWW Document]. URL <https://www.hact.org.uk/social-value-bank>
- Hay, R., Bradbury, S., Dixon, D., Martindale, K., Samuel, F., Tait, A., 2017. *Building Knowledge: Pathways to POE*. RIBA/University of Reading.
- KNOW, 2018. *Ethics of Research Practice* [WWW Document]. URL <https://www.urban-know.com/wp3-ethics>
- Mazzucato, M., 2018. *The Value of Everything: Making and Taking in the Global Economy*. Allen Lane, London.
- New Economy, 2019. *Cost Benefit Analysis Guidance and Model* [WWW Document].
URL <https://www.greatermanchester-ca.gov.uk/what-we-do/research/research-cost-benefit-analysis/>
- NHS England, 2018. *Healthy by design: The Healthy New Towns Network*.
- RIBA, 2018. *Ethics in Architectural Practice*. [WWW Document]
URL <https://www.architecture.com/-/media/gathercontent/un-sustainable-development-goals-in-practice/additional-documents/ethicsinarchitecturalpracticecasestudiespdf.pdf>
- RICS, 2020. *Red Book*. [WWW Document]
URL <https://www.rics.org/uk/upholding-professional-standards/sector-standards/valuation/red-book/>
- Ritchie, J., Lewis, J., McNaughton Nicholls, C., Ormston, R., 2013. *Qualitative Research Practice*. Sage, London.
- Samuel, F., 2018. *Why Architects Matter: Evidencing and Communicating the Value of Architects*. Routledge, London.
- Samuel, F., Hatleskog, E., 2020. *Architectural Design Special on Social Value*. Wiley, London.
- Sayce, S., 2018. *Building sustainability into valuation and worth*, in: Wilkinson, S., Dixon, T., Miller, N., Sayce, S. (Eds.), .
Routledge, London, pp. 132–146.
- Serin, B., Kenny, T., White, J., Samuel, F., 2018. *Design Value at Neighbourhood Scale*. Glasgow University, CACHE.
- Social Value Portal, 2019. *National TOMS Framework*. [WWW Document].
URL <https://socialvalueportal.com/national-toms/>
- Trowers & Hamblins, 2017. *Highly Valued, Hard to Value: Towards an Integrated Measurement of real estate development*. Oxford Brookes University.
- UKGBC, 2019. *Driving social value in new development: options for local authorities*. UK Green Building Council.
- UKGBC, 2020. *Delivering Social Value: Measurement*. UK Green Building Council. [WWW Document]
URL <https://www.ukgbc.org/ukgbc-work/delivering-social-value-measurement/>
- UKGov, 2018. *The Green Book*. London.
- Watson, K.J., Whitley, T., 2016. *Applying Social Return on Investment (SROI) to the built environment*. *Building Research & Information* 45, 875–891. <https://doi.org/10.1080/09613218.2016.1223486>

Appendix

Exemplar Ethics Consent Form

The Consent Form should always be accompanied by a project information sheet in plain English that sets out the aim of the survey, who is responsible for doing it (including contact details) and what will happen to the data. These forms need to be adapted to fit the project in hand.

Social Value Toolkit for Architecture Pilot Consent Form

Please answer the following questions to the best of your knowledge

HAVE YOU:	YES	NO
• been given information explaining about the study?	<input type="checkbox"/>	<input type="checkbox"/>
• had an opportunity to ask questions and discuss this study?	<input type="checkbox"/>	<input type="checkbox"/>
• received satisfactory answers to all questions you asked?	<input type="checkbox"/>	<input type="checkbox"/>
• received enough information about the study for you to make a decision about your participation?	<input type="checkbox"/>	<input type="checkbox"/>
DO YOU UNDERSTAND:		
• that you are free to request to withdraw from the study	<input type="checkbox"/>	<input type="checkbox"/>
• that your data will be kept confidential	<input type="checkbox"/>	<input type="checkbox"/>
• that you will be offered an opportunity to comment on draft publications emerging from this study in which you/your organisation are quoted or referenced in reasonable time to prior to publication. Any changes that you request will be made.	<input type="checkbox"/>	<input type="checkbox"/>
• photographs of the SVT pilot working group meetings will be used on social media and that you have the right to ask not to be included in these postings.	<input type="checkbox"/>	<input type="checkbox"/>
• you are responsible for the ethics and health and safety aspects of your own SVT POE exercise	<input type="checkbox"/>	<input type="checkbox"/>

I hereby fully and freely consent to my participation in this study

Signature: _____

Organisation: _____

Date: _____

Name in BLOCK Letters: _____

Royal Institute of British Architects
66 Portland Place, London W1B 1AD
Tel: +44 (0)20 7580 5533
Email: info@riba.org

RIBA 
Architecture.com