

# Delivery checklists

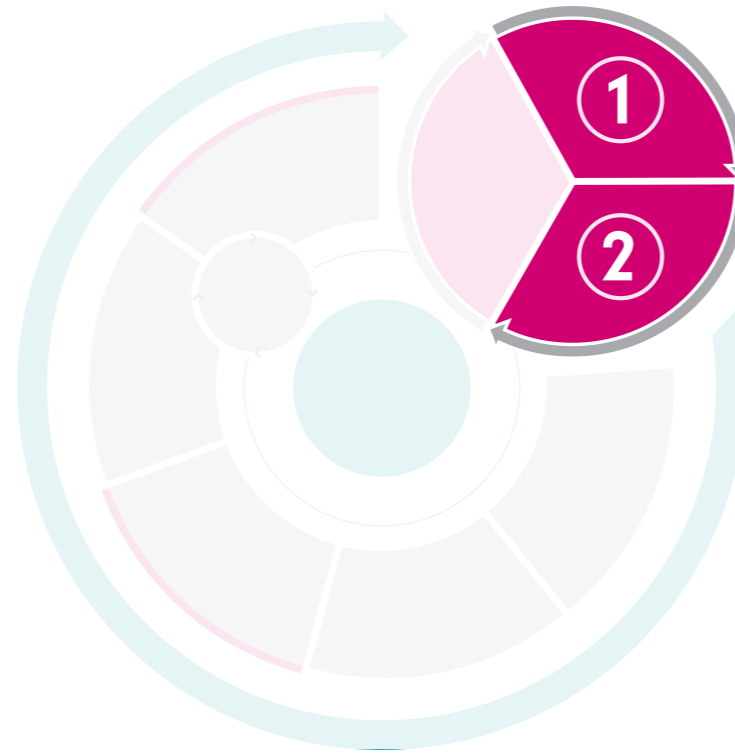
## Step 1: Agree social value purpose

### What does this mean?

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

### Why is Step 1 important?

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



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



For practitioner guidance see [Guidance Note 1](#)

## Step 2: Identify priority stakeholders

### What does this mean?

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

### Why is Step 2 important?

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

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



For practitioner guidance see [Guidance Note 2](#)

## Step 3: Understand stakeholder needs

### What does this mean?

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

### Why is Step 3 important?

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



#### 1. Conduct a local needs analysis

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

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

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



For practitioner guidance see [Guidance Note 3 and 4](#)

## Step 4: Agree social value outcomes

### What does this mean?

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

### Why is Step 4 important?

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

#### 1. Draft an initial list of social value outcomes

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

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

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

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

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

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

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



For practitioner guidance see [Guidance Note 5](#)

## Step 5: Create a social value delivery plan

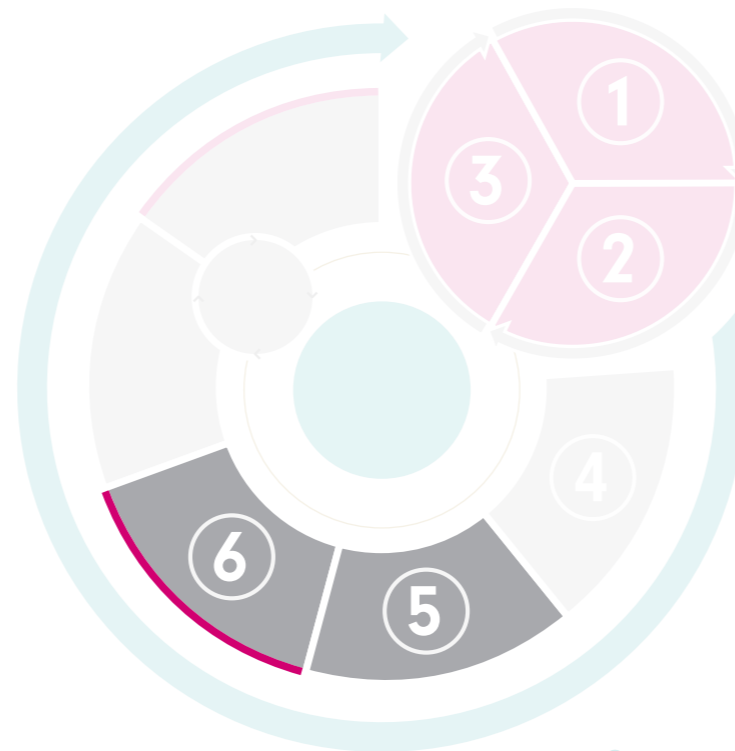
### What does this mean?

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

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

### Why is Step 5 important?

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



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



For practitioner guidance see [Guidance Note 6](#)

## Step 6: Put in place a social value measurement framework

### What does this mean?

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

### Why is Step 6 important?

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

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



For practitioner guidance see [Guidance Note 7](#)

## Step 7: Execute your social value delivery plan

### What does this mean?

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

### Why is Step 7 important?

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



#### 1. Execute your social value delivery plan

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



For practitioner guidance see [Guidance Note 8](#)



## Step 8: Ongoing measurement, monitoring and reporting

### What does this mean?

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

### Why is Step 8 important?

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

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

#### 1. Undertake regular monitoring and respond to the results

Regular monitoring should be undertaken by named individuals.

#### 2. Produce regular monitoring reports

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



For practitioner guidance see [Guidance Note 8](#)