### Date: 22<sup>nd</sup> February 2024

### **Attendees:**

Vaishali Baid (Action Sustainability, Sam Walker (Action Sustainability), Amelia Woodley (Speedy), Amy Dawson (Multiplex Global), Caron Dunlop (Mott MacDonald), Charlotte Davies (EQUANS), Cherrelle Abraham-Brown (London Square), Dave Norcott (Wessex Archaeology), David Wake (Galldris), Francesca De Petris (Tonygee), Giang Tran (Algeco), Graham Edgell (Morgan Sindall), Hannah Luckhurst (Onsite Support), Jessica Ambrose (Siemens), John Bowden (Keepmoat, Lara DaRocha-faria (Redrow), Laura Marshall (Tillbury Douglas), Lucille Watkins-Brazier (Lendlease), Magdalena Czerwinska (Reliable Contractors), Matthew Paget (Murphy Group), Natalie Hawkins (Linc Cymru), Olivia Sutcliffe (Savills), Rachel Lekman (MEUK), Rachel Irvin (Vistry Group), Sally Taylor (DEFRA), Sarah Fraser (Wilmott Dixon), Sarah Ottaway (SUEZ), Sharon Turner (NG Bailey), Sian Rebourg (Hill), Suzie Ellis (Galliford Try), Wendy Storey (SUEZ).

### Summary of actions & notes

Notes	& Actions						
No	Action/Note	Responsible					
1	<u>Chairperson Position</u> The Social Value Leadership Group would like to thank all those who applied for the Chairperson role. Following two weeks of voting, we would like to congratulate our two new co-chairs:	Sam (Action Sustainability)					
	Andrea Holt – Group Strategic Delivery Manager - Social Impact at <b>Balfour Beatty</b> Amelia Woodley – ESG Director at <b>Speedy Services</b>						
	Social Value Team						
	Social Value Group Lead Valshali Bald Sam Walker Sam Wa						
	SUPRY CHAIN BUSTANABULTY SCHOLL SCHOLL SUPRY CHAIN BUSTANABULTY SCHOLL Balfour Beatty						



### 2 Update on Deliverables

An update of the resources that were currently being produced were discussed. This included:

Navigating Social Value: A Guide to Key Terms and the Evolving Social Landscape

To be released very soon!

The guide will explore key terms often used when discussing social value and their connection to the term. A section on additional resources connected to the terms is also included.



#### **SME Report**

The SME Report is a collaboration with Cardiff Business School, exploring the social value landscape and barriers to delivering social value, specifically for SMEs.

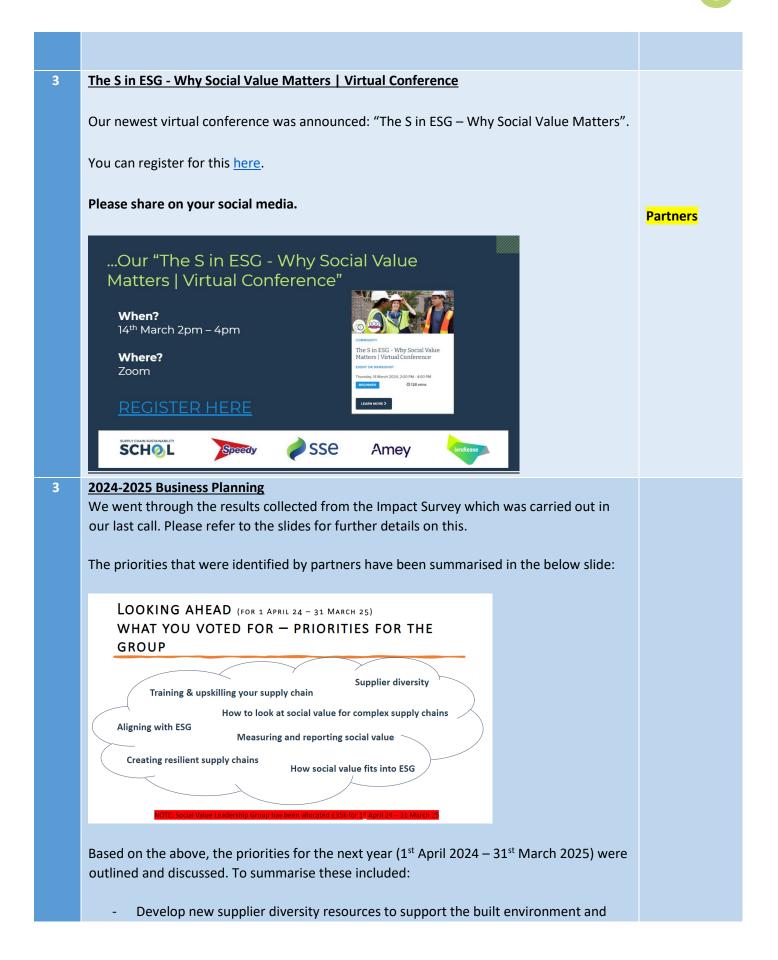
The report follows on from the SME survey that was carried out last year; thanks again to all the partners who shared the survey!

Case studies will feature throughout the SME report.

To be released in September 2024 followed by a virtual conference and webinar

If you have any case studies that demonstrate the effective delivery of social value by SMEs? Please contact Sam.









update existing resources.

- Showcase social value tender best practices questions and responses to support the built environment.
- Refine social value resources with updated information
- Showcase best practice and strategic approaches to social value.
- Other:
  - Collaborate with other groups in the School for specific topics e.g. Wellbeing, FIR etc.
  - Social Sustainability workshop as per the requirement in the catalogue
  - Cover legislations and regulatory parts ESG
  - Upskilling Social Value taskforce

### **Proposed Training & Events Schedule**

The proposed training and events schedule was also discussed with various events coming up across the year. This included:

# PROPOSED TRAINING / EVENT SCHEDULE 2024-2025

Deliverables Target	Туре	Apr-Jun	July-Sept	Oct- Dec	Jan - Mar
Roundtable to talk about social value from a C-Suite and SLT perspective – brainstorming and insights from the sector, along with lessons learned, future direction, avoiding tunnel vision, regulations. Practical insights. PLANNING TO START IN APRIL - Partner location (ideally central) - Support to run this session – advisors Amelia and Andrea	Face to face			October	
Virtual Conference- launch of Social Landscape report and getting industry experts to share their approach towards ESG and looking at the 'S' part of ESG	Currently in March				
Case Study – webinars every month of specific topics with experts	Webinar (x12)				
Virtual Conference- Launch of SME report and hearing from industry experts and SMEs about their approach towards social value and procurement.	Virtual Conference		Sept		
Business drivers and legislative landscape – what new legislation is coming and implications for business, trends on business drivers	Workshop				

Please register and promote the Virtual Conference on our Navigating the Social Landscape report on your social media channels! See slide 7 for additional details.

#### Menti Questions

Based on the events outlined above, Menti was used to collect thoughts from Partners of the group on what should be included in each session.

This included:

- 1. On the Roundtable event; what should be included in this, what lessons learned would you recommend be included? What practical insights, any suggestions on locations?
- 2. Webinars: What topics should be covered, any case studies you would recommend, any speakers you would recommend?

## Social Value Working Group Meeting 22<sup>nd</sup> February 2023



<ol><li>SME Virtual Conference: Any speakers you would recommend? Any particular case studies?</li></ol>	
If you would like to add your thoughts to this, please click <u>here</u> or email <u>Sam</u> directly.	
The Menti will be kept open until the EOD Friday 1 <sup>st</sup> March.	
Jamboard Questions	
A discussion was facilitated on social value and procurement, and, in particular on:	Partners
- Current practice for tender and responses.	
- Topics and themes covered in this.	
- Case studies and examples	
The results from this were collected on Jamboard and can be seen at the end of this	
document. If you would like to add to these, you can do so by adding to the Jamboard	
here or by emailing <u>Sam</u> .	
Next session	
Wednesday 12 <sup>th</sup> June 2pm-4pm	

## Appendix

### Jamboard Responses

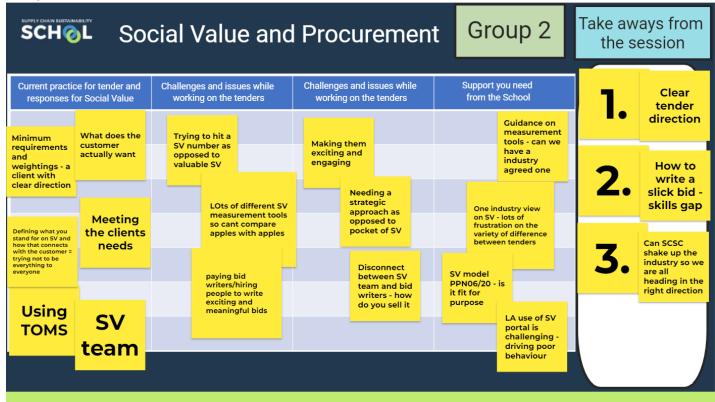
## Group 1

	cial Value and	Procurement	Group 1	Take aways from the session
Current practice for tender and responses for Social Value	Challenges and issues while working on the tenders	Challenges and issues while working on the tenders	Support you need from the School	
Our Social Value Standards/Strategy was devised from looking at what our clients want/looking at common themes, every community	Cost to fulfil obligations on the tenders	Lack of understanding of scoring, what scores highly Additionality and	Best practice responding using SV Model & MAC criteria	
different so we adapt to the required needs	Upskilling BD teams on SV - otherwise they are reliant on	how it's applied - misses the difference between the intrinsic benefits of how an	How to score SMEs compared to larger	2.
Tender is reviewed and sent to the most appropriate team, we will review the strategy of the company, how aligned is ours to theirs. What are we doing that	Fully understanding requirements of the guestion - can often be unclear.	organisation runs (or not as the case may be). Some tenders restrict us on what we can deliver and are sometimes driven by	companies, different expectations? Drive the conversation	3.
would be of value bespoke for different client/area/ construction sectors ie water/infra/DFE - there is a lot of cross departmental work which is great -	Lack of knowledge understanding of SV Lack of consistency of how SV is applied and expectations by customers. Meaning teams have to reinvent the wheel almost every	the TOMs (high value proxy) rather than the positive impact we can generate for that community Some tenders ask for unrealistic asks, g ask us to employ 4 apprentices on an this development to the valuation set	around additionality Support and influence progr in terms of mor trusted approa cores) tations sy measureme terms or provid reassurance no reculation	ess e ch to nt (in ing

SUPPLY CHAIN SUSTAINABILITY



Group 2



Group 3

SUPPLY CHAIN SUBTAINABILITY	So	cial	Value and	Procurement	Group 3	Take aways from the session
Current practice for responses for So			nges and issues while king on the tenders	Challenges and issues while working on the tenders	Support you need from the School	1
Defining what you mean by SV- its means different things to different people e.g. for us it is purely about additional community benefits and social and env risks - core	Making them relevant to wh the projects a ensuring that doing researc ensuring the delivery to be to the area.	re, are h and	There is lack of capability and confidence in evaluators in assessing this area		What good looks like in relation to a social value response.	r and tcome so not rs of e.g. hips, real
Fulfilling what as stually been ormised in a tender. e importance of emystifying how mplicated / easy the slivery of SV is uring a contract. cylaining their role a	Identificat of partner stakehold capacity building	s/			Difficult to identify SME's/VCSE's, community related initiatives - something to help identify the groups/initiatives that are out there/or signpost to them.	3.
	Good pract guidance/t identifying relevant/us social value focus on e. are the skil in the mark	ips to eful a areas to g. what Is issues			Need examples of SV that can be achieved for a short term/low leverage project vs a high value high/leverage one, and myth that you can't address on low value.	

