

























Date: 22nd 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	<p><u>Chairperson Position</u></p> <p>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:</p> <p>Andrea Holt – Group Strategic Delivery Manager - Social Impact at Balfour Beatty Amelia Woodley – ESG Director at Speedy Services</p> <div><p>Social Value Team</p><table><tr><td><p>Social Value Group Lead Vaishali Baid</p></td><td><p>Social Value Group Manager Sam Walker</p></td><td><p>Social Value Co-Chair Amelia Woodley ESG Director</p></td><td><p>Social Value Co-Chair Andrea Holt Group Strategic Delivery Manager - Social Impact</p></td></tr></table></div>	 <p>Social Value Group Lead Vaishali Baid</p> 	 <p>Social Value Group Manager Sam Walker</p> 	 <p>Social Value Co-Chair Amelia Woodley ESG Director</p> 	 <p>Social Value Co-Chair Andrea Holt Group Strategic Delivery Manager - Social Impact</p> 	Sam (Action Sustainability)
 <p>Social Value Group Lead Vaishali Baid</p> 	 <p>Social Value Group Manager Sam Walker</p> 	 <p>Social Value Co-Chair Amelia Woodley ESG Director</p> 	 <p>Social Value Co-Chair Andrea Holt Group Strategic Delivery Manager - Social Impact</p> 			

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.

Partners

3 **The S in ESG - Why Social Value Matters | Virtual Conference**

Our newest virtual conference was announced: “The S in ESG – Why Social Value Matters”.

You can register for this [here](#).

Please share on your social media.

Partners



...Our “The S in ESG - Why Social Value Matters | Virtual Conference”

When?
14th March 2pm – 4pm

Where?
Zoom

[REGISTER HERE](#)

COMMUNITY
The S in ESG - Why Social Value Matters | Virtual Conference
EVENT OR WORKSHOP
Thursday, 14 March 2024, 2:00 PM - 4:00 PM
120 mins
LEARN MORE >

SUPPLY CHAIN SUSTAINABILITY **SCHOL** Speedy SSE Amey lendlease

3 **2024-2025 Business Planning**

We went through the results collected from the Impact Survey which was carried out in our last call. Please refer to the slides for further details on this.

The priorities that were identified by partners have been summarised in the below slide:



Based on the above, the priorities for the next year (1st April 2024 – 31st March 2025) were outlined and discussed. To summarise these included:

- Develop new supplier diversity resources to support the built environment and

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	Type	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?

Partners

	<p>3. SME Virtual Conference: Any speakers you would recommend? Any particular case studies?</p> <p>If you would like to add your thoughts to this, please click here or email Sam directly.</p> <p>The Menti will be kept open until the EOD Friday 1st March.</p>	
	<p>Jamboard Questions</p> <p>A discussion was facilitated on social value and procurement, and, in particular on:</p> <ul style="list-style-type: none"> - Current practice for tender and responses. - Topics and themes covered in this. - Case studies and examples <p>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 Sam.</p>	Partners
	<p>Next session</p> <p>Wednesday 12th June 2pm-4pm</p>	

Appendix

Jamboard Responses

Group 1

Social 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 different so we adapt to the required needs	Cost to fulfil obligations	Vague questions on the tenders	Best practice responding using SV Model & MAC criteria
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 would be of value	Upskilling BD teams on SV - otherwise they are reliant on our very small team	Lack of understanding of scoring, what scores highly	Encouraging collaboration & consistency
bespoke for different client/area/ construction sectors ie water/infra/DFE - there is a lot of cross departmental work which is great -	Fully understanding requirements of the question - can often be unclear.	Additionality and how it's applied - misses the difference between the intrinsic benefits of how an organisation runs (or not as the case may be).	How to score SMEs compared to larger companies, different expectations?
	Lack of knowledge / understanding of SV	Tenders are given to us sometimes very late in the day	Drive the conversation around additionality
	requirements hard to hit in specific area: not focused on the needs of the area	Some tenders restrict us on what we can deliver and are sometimes driven by the TOMs (high value proxy) rather than the positive impact we can generate for that community	Support and influence progress in terms of more trusted approach to SV measurement (in terms or providing reassurance not regulation)
	Lack of consistency of how SV is applied and expectations by customers. Meaning teams have to reinvent the wheel almost every tender..	Some tenders ask for unrealistic asks, eg ask us to employ 4 apprentices on an 8 month contract, or employ people who are NEET, who don't necessarily have the qualifications	
	Mis-trust/mis understanding of SV measurement	Lack of emphasis on SV in bids (low % in the evaluation scores) but high expectations in terms of questions/expectation s.	

1.
2.
3.

Group 2

Social Value and Procurement

Group 2

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
<div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Minimum requirements and weightings - a client with clear direction</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">What does the customer actually want</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Defining what you stand for on SV and how that connects with the customer = trying not to be everything to everyone</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Using TOMS</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">SV team</div>	<div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Trying to hit a SV number as opposed to valuable SV</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Lots of different SV measurement tools so cant compare apples with apples</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">paying bid writers/hiring people to write exciting and meaningful bids</div>	<div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Making them exciting and engaging</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Needing a strategic approach as opposed to pocket of SV</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Disconnect between SV team and bid writers - how do you sell it</div>	<div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Guidance on measurement tools - can we have a industry agreed one</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">One industry view on SV - lots of frustration on the variety of difference between tenders</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">SV model PPN06/20 - is it fit for purpose</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">LA use of SV portal is challenging - driving poor behaviour</div>

1.

Clear tender direction

2.

How to write a slick bid - skills gap

3.

Can SCSC shake up the industry so we are all heading in the right direction

Group 3

Social Value and Procurement

Group 3

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
<div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">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</div> <div style="background-color: pink; padding: 5px; margin-bottom: 5px;">Making them relevant to where the projects are, ensuring that are doing research and ensuring the delivery to bespoke to the area.</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">2) Fulfilling what as actually been promised in a tender. The importance of demystifying how complicated / easy the delivery of SV is during a contract. Explaining their role a</div> <div style="background-color: pink; padding: 5px; margin-bottom: 5px;">Identification of partners / stakeholders - capacity building</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Good practice guidance/tips to identifying relevant/useful social value areas to focus on e.g. what are the skills issues in the market etc.</div>	<div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">There is lack of capability and confidence in evaluators in assessing this area.</div>		<div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">What good looks like in relation to a social value response.</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">Reporting - consistency and ensuring outcome delivered (so not just numbers of e.g. apprenticeships, what is the real value that has been delivered)</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">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.</div> <div style="background-color: yellow; padding: 5px; margin-bottom: 5px;">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.</div>

1.

2.

3.

