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Mulholland, Cara, Hughes, Jenny, Samuel, Flora and Mitchell, Keith (2020) Better Places (Social Value) Toolkit: Scoping review of existing tools, processes, practices, and frameworks [Stage 1 Report]. Research Report. Stantec.

DOI: <https://doi.org/10.23634/MMU.00639704>

Publisher: Stantec

Version: Published Version

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Better Places (Social Value) Toolkit

Scoping review of existing tools, processes, practices, and frameworks
Stage 1 Report | December 2020



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SUMMARY

The Better Places Toolkit is a two-year Knowledge Transfer Project between Stantec and the University of Reading. Its aim is to produce a tool that facilitates the inclusion of social value in decision making about land valuation and acquisition.

By reviewing existing tools and practices we have identified a gap for a spatial, digitally enabled tool for exploring early project social value forecasting. We want to create a tool that uses evidence to disrupt the current decision-making processes in early strategic land development. This can influence how projects are conceptualised from the beginning, potentially influencing timelines of implementation and build design.

In this report we have outlined the findings from Stage 1 of the project. This starts with a wider introduction to the context of the project and high-level summary of the current thought leadership in social value of the built environment. We then present the findings from the desk review research of a longlist of 66 relevant social value, placemaking and engagement tools, which were then refined down to a shortlist of 17 for a deep dive review. This includes highlighting strengths and weaknesses in existing social value tools to facilitate early strategic decision making. The final section poses design decisions to structure the future tool development based on potential user needs, and the stakeholder responses on tool development to be worked on in Stage 2 of the project.

The Better Places Toolkit needs to offer a solution that meets the needs of the industry: identifying when in the project most social value could be created, who are the key parties in driving for that social value, why social value is often optioneered out, and what would create the right incentives to push for more social value. In understanding these, we can understand why existing tools have or have not worked well or met needs, and we can optimise the design of Better Places Toolkit.

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ACKNOWLEDGEMENTS

This report and its findings have been shaped by the generous contributions of the stakeholders who have supported the aims of the Better Places Toolkit by sharing their knowledge and experience to help us better understand the industry needs and realities for creating better social value outcomes.

External Stakeholder Group

- Jon Blower (Institute for Environmental Analytics)
- Justin Kliger (Connected Places Catapult)
- Jude Hassall (Greater London Authority)
- Gill Marshall (UK Regeneration)
- Jackie Sadek (UK Regeneration)
- Matthew Morgan (Quality of Life Foundation)
- Matthew Niblett (The Independent Transport Commission)
- Robert Wolfe (CHY)
- Katherine Pollard (Scottish Land Commission)
- Vikki Slade (Cratus)
- Claire Bradbury (Action Sustainability)
- Ron Lang (Construction Innovation Hub)
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We would like to thank the funders of this Knowledge Transfer Partnership in collaboration with the University of Reading: the Economic and Social Research Council, the Arts and Humanities Research Council and Innovate UK



1 INTRODUCTION

The aim of the Better Places Toolkit is to develop a tool that makes it easy to incorporate social value into decision making around the use of land. This report presents the findings of the explorative study completed as the Stage 1 of the Better Places (Social Value) Toolkit (Better Places Toolkit) project.

The Better Places Toolkit project is a collaborative Innovate UK funded Knowledge Transfer Partnership (KTP) between Stantec and the University of Reading. It aims to develop a process to quantify social value outcomes to enable informed decision-making for better strategic land development projects which deliver better community, climate change and commercial outcomes.

Social value is playing an increasingly important role in how we approach land development, but there is a lack of guidance for the development industry on how social value should be defined and how it can be used to inform the deployment and valuation of land. Our toolkit proposes to quantify and spatially map social value data to deliver a digital analytics solution to improve evidence-based decision making.

The Better Places Toolkit KTP has begun with an explorative study to determine what the current best practice of social value creation and measurement in strategic land development might be, primarily based on a desk review of tools and practices and compared against extensive stakeholder engagement. This report outlines the key findings from the high-level longlist and more detailed short list desk review of tools and frameworks, followed by suggestions to satisfy the gaps and challenges identified by key stakeholders both during the review process and in the focused workshop.

1.1 THE BETTER PLACES TOOLKIT PARTNERSHIP

“What is needed to create healthy, prosperous and sustainable communities?” (Stantec Places First, 2020) In recent years, there has been much debate on how we address the housing crisis and how to deliver continuing economic growth, whilst also improving the way we plan, design and deliver the quality of place that can foster more prosperous, sustainable and healthy communities. Stantec has responded to this challenge through the development of its ‘Places First’ series and through extensive client and stakeholder engagement programmes between 2017-2019. Stantec is now embarking upon ‘Places First 3: Transformation through New Communities’ (Stantec Places First, 2020) a facilitated programme of client and community engagement.

Places First 3 takes Stantec’s previous research further, and seeks to explore detailed areas of the design, delivery, and functionality of communities, by researching how we navigate and respond to current societal challenges and opportunities. The research will explore how to design better places to respond to technological advances, climate change and ecological emergencies (RTPI, 2020; Design Council, 2020) The Better Places Toolkit KTP has a key role to play in Stantec’s continued thought leadership in this area. With social value being one of six key themes, ‘Places First 3’ aims to explore using social value to underpin better decision making in planning and investment.

The University of Reading brings a wealth of experience in social value research to the project. Previous industry-focused, academic projects such as the RIBA Social Value Toolkit for Architecture (RIBA, 2020) and the Mapping Eco-Social Assets (MESA) (University of Reading, 2020) project have pushed practitioners to think about the impact of their work differently by considering the views of the people and communities who use the spaces and places. The Better Places Toolkit project builds on this previous work by focusing on the development of social value data collection processes into a digitally enabled and spatially mapped tool for a new user base: those in strategic land development.

The Better Places Toolkit project has explicitly grown from the previous work done by the Stantec and University of Reading partners, and builds on previous knowledge, experience and understanding of needs of industry. By bringing these together and focusing on spatial mapping of social value strategic land development the toolkit development aims to be a mechanism that develops thought leadership and best practice in several areas.



1.2 SOCIAL VALUE CREATION FOR BETTER PLACES

Social value is defined in the Public Services (Social Value) Act 2012 as the “economic, social and environmental well-being of the relevant area”. Although the Act specially set out requirements for local authorities procuring public services, social value has more widely been gaining attention increasingly since then, with a mixed reception of how well project delivery, procurement processes and wider practices have incorporated social value (Cabinet Office Review, 2015).

In more recent years, concerted and joined up efforts across the built environment industry have sought to address the challenges and ambiguity by creating an agreed foundation to work from (UKGBC). Further social value seems set to become an integral part of building procurement through the value workstream within the Construction Innovation Hub and the BRE. Efforts have typically been focused on developing shared definitions, creating common language, agreeing on robust metrics, and attempting to find methodologies which satisfy the needs of measuring and reporting social value in a meaningful way.

This increased attention on social value has been running alongside other efforts to understand and create better places such as the development of post-occupancy studies, sustainability frameworks, placemaking initiatives and the creation of new design regulations and standards. Often social value practices have not explicitly connected with these other areas of work, as the challenge of establishing an agreed foundation of social value standards is complex so needed to have a narrowed scope. This work aims to bring together parallel and overlapping practices to explore how a new impactful digital approach could be developed.

1.2.1 CURRENT SOCIAL VALUE THOUGHT LEADERSHIP

In the past year social value practices in the built environment have gone from strength to strength. This became apparent when in Spring 2020 a series of reports from different industry bodies were published that solidified the significance of social value to built environment professionals. This included the **Institute of Civil Engineers (Maximising Social Value from Infrastructure Projects, 2020)** and **UK Green Building Council (Social value in the built environment (industry update), 2020)** published guidance on how the social value agenda can be embedded across project lifecycles; Royal Institute of British Architects (The Social Value Toolkit for Architecture, 2020) pushing for post-occupancy studies to measure impact of design; Retail Evolution (Social value framework Guidance on data and methodology, 2020) creating a measurement framework to report the social value of high streets; and Institute of Economic Development (From the Ground Up – Improving the Delivery of Social Value in Construction, 2020) publishing the results of a study in the construction industry on current practices and perceptions. These publications do not contradict one another, all agreeing that social value is difficult to define and will differ depending on the context, and changes across the project life. But they have chosen to focus on certain areas of the social value challenge, and as such are drawing attention and activity to the aspect they view as important.

The reports were each the product of distinct, robust consultation and evidence gathering processes aiming to provide insight to a complex but important agenda for a myriad of organisations working in the built environment. Each report aimed to provide clarity for a different aspect of social value. There was a broad consensus of agreed principles:

- Social value needs to be considered across the **whole project life cycle**: however, most effort is currently focused on social value through delivery and construction.
- **Measurement is essential** to understand social value more deeply, but this can be done in many ways and there is not yet a full set of metrics and processes agreed (or a desire explicitly referenced for this).
- Understanding **local needs, the wider context**, and learning from post-occupancy studies can create learning loops for better outcomes in future projects.
- The **language of social value is still confusing and ambiguous**. It needs to be tailored depending on sector and client needs.

These accounts are clearly very relevant and influence our approach to the development of the Better Places Toolkit, however, there are a number of yet under-developed aspects of social value. Firstly, none of these reports focus on how social value practices can be established to facilitate decision making as early as possible, before a specific project has officially initiated.

This raises the question of how the gap between project lifecycles be effectively closed to create an evidence base for new project. Secondly, the social value metrics which are most widely agreed upon are limited (due to further robust testing needed) and are not yet adequate for strategic land development whole life considerations. And more broadly, these foundational reports indicate there are not yet easy to use, intuitive tools that draw on automated data or even extensive data sets for evidence bases. These current gaps set the stage for the Better Places Toolkit research scope.

1.2.2 DIGITAL TOOLS FOR DATA GATHERING IN THE BUILT ENVIRONMENT

Efforts to assess social value thus far have been focused on aspects such as language used, definitions, agreeing metrics and measurement methods, establishing shared meanings, and bringing together experts to get industry buy in. The development of tools and processes has been limited. And those which have been created so far mostly do not satisfy the needs of strategic land development social value: the metrics used are not appropriate, they are not designed for the correct users, they don't accurately represent the complex spatial and temporal considerations.

This is where learning from the parallel relevant fields can be fruitful. There are established tools (with varying levels of digital integration) for placemaking, sustainability, engagement, and planning. Of course, these may not be one solution for all projects, and may also fall victim to the built environment uptake of digitalization, but they are ahead of social value.

There are also many digital processes which have different explicit focuses, but which incorporate elements of social value within the process. This is commonly seen in GIS techniques which are applied and used in many projects to map natural assets or socio-economics. These social value datasets and their spatial representation may not yet be at the maturity level needed to claim they evidence social value, but there is certainly learning to come from existing use of GIS tools and techniques.

The Construction Innovation Hub (**An Introduction To The Value Toolkit, 2020**) are building on the wider social value thought leadership and working closely with integral professional bodies as well as a range of key organisations to design a web-based platform that begins the process of digitizing the social value process. However, this will be a platform which integrates existing metrics, focusing on the project cycle once initiated, and doesn't plan to map social value spatially. This is a key area of work which strongly aligns with the Better Places Toolkit work. There is potential for the Better Places Toolkit to contribute to this cross-industry, inter-disciplinary effort which is demonstrating how different areas of expertise in social value are being brought together into a community of practice as thus far there is a gap in social value being considered in the earliest stages of projects.

1.2.3 WHY WE ARE FOCUSED ON STRATEGIC LAND DEVELOPMENT

Responding to client needs and a gap in existing practices, Stantec has narrowed their preferred focus to strategic land projects. We acknowledge there is a similar need for other land development projects, including regeneration or urban derelict land for example, but in an attempt to narrow the scope of the project strategic land has been highlighted as a unique challenge that would benefit from direct focus. However, it is our intention that the learning from the Better Places Toolkit development will also be beneficial to wider land development projects of all kinds.

1.3 BETTER PLACES TOOLKIT EXPLORATORY REVIEW

The review of current social value thought leadership and moves towards digitisation in the built environment have highlighted a gap for more well evidenced and tested digital tools in the social value arena. Specifically, there is a lack of focus on the very early decision making in projects which encompasses social value, and there is a lack of robust metrics which adequately communicate the whole picture of social value in strategic land development.

The foundation of the project inception was that Better Places Toolkit would provide a tool for one part of the project lifecycle, to build on and complement existing thought leadership and programmes of work. It is hoped that the Better Places Toolkit can influence later design and planning decisions by prioritising social value in strategic land development projects during site preparation and early strategy making. There may be some degree of learning from previous projects to shape new projects and forecast social value outcomes. These focus of Better Places Toolkit of the project cycle are outlined in Figure 1.

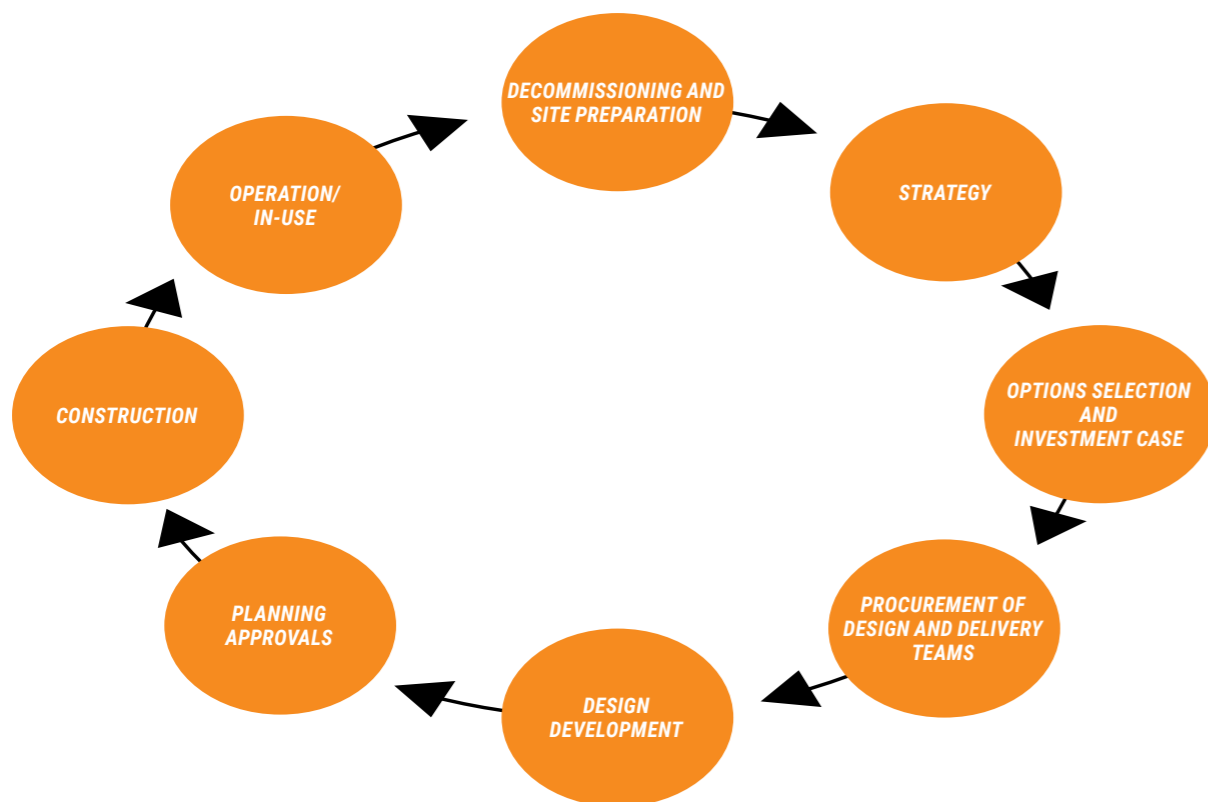


Figure 1. The delivery stages that the Better Places Toolkit will focus on, adapted from ICE's social value project lifecycle.

The purpose of Stage 1 was to review a range of existing tools that may have relevance for the development of the Better Places Toolkit and to check our assumptions that there is a gap in existing practices and a need for a new tool. The experience of the project team meant we knew there were many tools available to do work similar to what is expected from the Better Places Toolkit, but none which fulfil it completely. However, we wanted to test this hypothesis by reviewing existing tools and getting feedback from industry.

The report presents findings from the desk review followed by feedback from the external stakeholder group, which together have shaped the next steps set out for Stage 2 of the project.

2 REVIEW OF EXISTING TOOLS AND FRAMEWORKS

This review of existing tools and frameworks is an exploratory study to determine and assess current best practice in social value mapping and measurement applicable to strategic land development.

To explore the need for a new tool, the following questions were explored:

- What tools or practices exist, and how widely are they used?
- What gaps or opportunities exist between established tools and practices?
- What do users want to see from tools, and how / is this currently being met?
- What would be beneficial and impactful in a new tool? How would it address user needs and gaps in existing tools and practices?

The review was comprised of two stages. First, a longlist of relevant tools was created and a high-level review of these was undertaken, and this was followed by a detailed review of a shortlist of tools. An explanation of these selections processes is found in the methods section and the review can be seen in the tables included in the appendices.

This review process was undertaken to enable refinement of the scope the Better Places Toolkit, and to validate and steer the aims to achieve.

2.1 LONG LIST REVIEW: CHARACTERISTICS AND CATEGORIES

The tools included within the longlist review were briefly assessed for their suitability to be included in the shortlist for a more detailed review. The tools included in this stage of the review provide a useful insight and overview of the current state of practice. This can be most helpfully summarised in an overview of their characteristics and through a categorisation.

2.1.1 CATEGORISATION OF TOOL TYPE AND FOCUS

To understand the array of tools and frameworks reviewed they were categorised to reveal their primary characteristics, as shown below in Table 1. The overarching motivation and type columns reflect the search criteria used to find the long list of tools. The focus and sector were used to filter that the tool was not irrelevant, but were not restricted for inclusion. Validation was a way the tools were categorised during the review process when the theme emerged.

These categories summarise the mix of stakeholders across the built environment who have an interest in work similar to that of the Better Places Toolkit. The parallel objectives of sustainability, placemaking, engagement and social value are being approached from many angles.

What is revealing about these categories is that even though there are many tools doing similar things to the research premise of the Better Places Toolkit, there are none which operate in exactly the same space. That is, very early in the project, in strategic land development, and offering a spatial, digital tool to facilitate decision making. In fact, every tool reviewed has had to reduce its scope to be practical and evidence that it can work in one space before being scaled or replicated elsewhere. This is representative of the challenge of social value in such large, complex projects: a complex, messy subject being explored in a complex, messy context.

Table 1. Categorisation of tool type and focus in longlist review.

OVERARCHING MOTIVATION	TYPE	FOCUS	SECTOR	VALIDATION
<ul style="list-style-type: none"> Social value Placemaking Sustainability Engagement (stakeholder centred design/ co-design) 	<ul style="list-style-type: none"> Guiding framework Appraisal framework Tool Mapping tool Metrics Methodology 	<ul style="list-style-type: none"> Business Culture Ecosystem Services Engagement Environmental benefits Health Methods Natural Capital Outcomes Placemaking Resilience Social impact Social value 5 Capitals Sustainability Wellbeing Value 	<ul style="list-style-type: none"> Baselines Buildings Built environment Cities Community Construction Developers/ planning Development Energy Health and social services Housing Inclusive design Infrastructure Investment Land development Land remediation Organisation Planning Projects Rail Retail Transport Urban greenspaces 	<ul style="list-style-type: none"> External accreditation Tool as a service Done in-house Stantec developed tool

From the categorisation of tools it was apparent that there are some tools doing similar work to the proposed Better Places Toolkit. These are:

- **BREEAM Communities** – operating at the very early stages of strategic land development, with relevant social value target metrics.
- **SoLVES (Social Values for Ecosystem Services)** – the US Government based GIS plugin which maps social value as interpreted from ecosystem services surveys done by asset users.
- **MESA (Mapping Eco-Social Assets)** – University of Reading methodology developed to map eco-social values as reported by community members.
- **Scottish Land Commission** – Guidance on Assessing the Full Economic Benefits of the Productive Reuse of Land

2.1.2 CHARACTERISTICS

All tools were assessed against a list of characteristics that would make them most relevant to developing the Better Places Toolkit. The relevant characteristics analysed were whether and how the tools incorporated:

- Spatial mapping: is the social value represented geographically
- Monetisation of social value: has the data used financial proxies
- Quantification of social value: has the data been collected quantitatively
- Learning from principles: can Better Places Toolkit draw on the social value relevant principles outlined
- Learning from metrics, methods, and processes: can Better Places Toolkit learn from how the tools work

This characteristic overview helped us quickly deduce perspectives of current tools and approaches, as summarised below:

Mapping of social value: Very few tools or frameworks aim to map social value. The spatial consideration of where social value is created has not yet been included as standard practice. This raises issues when considering large scale engineering and infrastructure projects in the built environment: the issue of “where” social value is felt and how communities are impacted differently is significant, even if complex to portray. This analysis does not assume that all tools would benefit from mapping as they currently stand, but notes that the importance of spatial factors in planning strategic projects is not adequately represented in currently available tools or frameworks.

Monetisation of social value: Few tools that measure social value incorporate the monetisation of social value, for example through commonly used methods such as Social Return on Investment. This is most likely a reflection of the challenges faced in applying monetary values to apparently intangible benefits. Natural Capital and Wellbeing approaches appear to have the most established approach to this.

Quantification of social value: Many of the tools produce high level principles which may be assessed qualitatively. Of those which did quantify social value there were not necessarily standardised processes for this. A few tools use a scoring system which lets evidence of quantified social value become a more standard, comparable output.

Principles of social value: Many tools offer high level principles which will be directly relevant to the Better Places Toolkit. These are not always translatable into more specific outputs, outcomes or metrics, but provide the frameworks for decision making to account for wider thinking of social value.

Metrics, methods and processes of social value: there were no widely used or standard approaches to metrics, methods or processes other than pushing to move from outputs to outcomes-thinking. This aligns with the immaturity of the field, which is setting higher level foundational thinking.

2.1.3 SUMMARY

The long list tool review highlighted several gaps in existing tools and frameworks in relation to the aims and objectives of the proposed Better Places Toolkit. By considering the main areas of social value, placemaking and digital approaches we have established key gaps, opportunities, and challenges for the Better Places Toolkit as summarised below.

The **SOCIAL VALUE TOOLS AND FRAMEWORKS**, in general:

- Do not think early enough in the project cycle, and instead have a strong focus on delivery.
- Do not include many metrics outside of construction, however, noting that some focus on quantifying social value post-occupancy.
- Do not consider spatial dimensions on a large scale (or temporal dimension when considering when social value is added). If spatial dimensions are considered, there is limited mapping.
- Do not have metrics that consider design in detail. In general, approaches and processes are missing more difficult to measure aspects (e.g. community cohesion and quality of outside space) that are more important to places.

PLACEMAKING TOOLS AND FRAMEWORKS:

- Do include consideration of wider benefits which are relevant to Better Places Toolkit. Many of the frameworks consider wider benefits such as community cohesion and wellbeing.
- Do not yet embed placemaking measurements into practices. There are demonstrative case studies, but no evidence of standardised or widely measurable approaches.
- Do not have tools that can yet appropriately measure the principles suggested, and there are no very widely used tools.

Other **DIGITAL** approaches:

- Do already have some social impact mapping, with GIS- based approaches already doing this as standard practice. But the social components are not wide enough.
- Do have existing tools that are designed well for some needs of the Better Places Toolkit. Engagement tools are a good model, with some trying to measure the right things. But they do not always quantify or monetise.

Embedding approaches into the **DECISION PROCESS**:

- Some tools are very widely used across a range of projects and at a range of stages. But it is difficult to determine from publicly available information how much they influence decisions.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">▪ Language of social value is becoming increasingly common as more organisations work together.▪ Wider benefits relevant to the Better Places Toolkit have already been explored in placemaking tools.▪ Social impact mapping already happens with GIS- based approaches and digital engagement tools.	<ul style="list-style-type: none">▪ Limited metrics and proxies used, focused on construction phase often and don't take into account spatial factors.▪ Embedding concepts into practice not yet done for placemaking.▪ Focus on environmental or economic impacts in sustainability.▪ Challenging to get wide responses in real time to be spatially mapped.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">▪ Maturing social value agenda across the built environment.▪ Digitisation of the built environment show appetite for social value to follow.▪ Government contracts including social value evaluation as standard.▪ Existing digital engagement tools that are designed well for capturing social value perceptions.	<ul style="list-style-type: none">▪ So many tools can make organisations sceptical of their use.▪ Some tools are very widely used but hard to determine influence on decision-making.▪ All tools suffer from ambiguous language use and parallel agendas.▪ Debates of monetisation and quantification of social value.

Figure 2. SWOT analysis of existing tools

2.2 SHORT LIST REVIEW: EMERGING THEMES

Table 2. Shortlisted tools for in-depth review, summarised by type.

NAME	OWNER/ DESIGNER	TYPE
EXTERNAL ACCREDITATION		
These tools are managed by independent bodies who review the required evidence presented by project teams.		
WELL Building (Community)	International WELL Building Institute	Appraisal framework
BREEAM (Community)	BRE	Appraisal framework
Livewell Development Accreditation	Essex Planning Officers Association	Appraisal framework
TOOL AS A SERVICE		
These tools are externally sourced and managed, delivered as a whole package service for a project.		
Greenkeeper	Barton Wilmore	Tool
Commonplace	Commonplace	Tool
Streetscore	Create Streets	Tool
Framework for Capturing Wider Benefits	Scottish Land Commission	Appraisal framework
USE INTERNALLY		
These tools are created by independent bodies, but freely available for project teams to use themselves without review needed.		
The Outcomes Matrix	Good Finance	Web based tool
Place Standard	Scottish Gov	Tool
Social Value of Ecosystem Services (SolVES)	USGS	Tool
BEST (Benefits Estimation Tool)	CIRIA (developed by Stantec)	Tool
Exeter Future Placemaking Toolkit	Partnership	Framework (called a toolkit)
Creating Successful Places - A toolkit	Berkeley	Framework/ approach
Natural Capital Planning Toolkit	Centre for Environmental Economics and Policy (CEEP)	Tool
STANTEC TOOL		
Tools developed within Stantec and used on internal projects. They were created to meet specific project and client needs.		
Equilibrium	Stantec	Tool
Stantec Socio-economic baseline tool	Stantec	Tool
UNIVERSITY OF READING		
Existing social value mapping techniques used by the university team.		
MESA	University of Reading	Methodology

A more detailed review was progressed of a chosen few tools which were characterised as more relevant for Better Places Toolkit, as satisfying more than one characteristic (more details in the Methods section at the end). The detailed review covered many aspects that will be useful for later tool development, but the key learning has been in relation to these emerging themes: what tools have been most widely used and why; how has social value been mapped previously and using what data; and which create the most impact on project decisions and how.

The 17 tools and frameworks reviewed in more detail as part of the short list are listed below. This list will be expanded as the project progressing and other tools are identified.

2.2.1 WIDELY USED TOOLS

The tools which gain greatest attention and are most used on projects are those which are externally accredited: BREEAM and WELL Building specifically. It would be fair to assume that getting to the point of large scale buy in relies on having an independent research body which can aim for unbiased, standard approaches. This can be seen with social value as well, such as with Social Value UK and Social Value Portal both leading as they integrate others.

Both BREEAM Communities and WELL Building have chosen to work on a scoring and rating system, achieving points through evidence of decisions and implementation. This makes the frameworks comparable across projects, as a score is easily communicated. However, by creating a systemised approach that can be applied to many projects these frameworks have had to greatly simplify the complex considerations of what can be included in their appraisals.

The primary barriers to wider use of these tools is the issue of high costs and the resource intensity of undertaking projects and achieving accreditation. To collate and complete the evidence base required for assessment takes a substantial amount of work, benefitted by professional expertise and experience in the area. The reason for the intensiveness of resources is due to the robustness coming from the established bodies doing lots of research for evidence based, and thus needing strong evidence to compare against. The credibility and reputation of these frameworks means larger projects see the benefit to investing in an assessment.

2.2.2 SOCIAL VALUE MAPPING TOOLS

SolVES and MESA are two very distinct tools but are both very relevant tools in how they the social value data which they purposefully gather. The MESA approach focused on in-depth feedback from community groups to understand how assets and spaces are valued, using a wellbeing proxy approach to monetise some of these benefits, but also capturing qualitative feedback. The SolVES approach uses ecosystem services themed surveys to quantify the value assigned to natural assets in a free to use GID-plugin.

There is potential that the methodologies of these tools could be merged in some way, with the MESA survey input replace the SolVES surveys used. The disparity comes in the choice between measures versus scoring (MESA applies measurement proxies, SolVES scores) but ultimately both produce heat maps.

Both operate as post-occupancy or in use feedback from asset users, but this may be an approach to understanding what has worked well before to influence new decisions.

2.2.3 TOOLS IMPACTING DECISION MAKING

The tools and frameworks have all had impact in different ways, influencing decision making through the governance and management of projects. Three primary ways the tools have been used in decision making across the project lifecycle are:

- **Engagement: getting feedback on design and use.** Tools such as Greenkeeper and Commonplace focus on engagement for this specific reason. It is about using new tools and methods to gather feedback from users and communities of assets and spaces to provide data that can be used as insight for future design.
- **Facilitating discussion and setting priorities.** Tools and frameworks can either focus on this as an explicit reason for use, or it is embedded as part of the process when looking for other outcomes. Equilibrium (Stantec), Berkeley Creating Better Places Toolkit and Livewell Development Accreditation, Essex Planning Officers Association are three tools and frameworks which did this, but in differing ways. Equilibrium was about mapping priorities and identifying strengths and weaknesses, with the view of doing more in-depth measurement but that created great discussion outcomes with clients. Berkeley created a toolkit that explicitly built in engagement activities meant to determine priorities, but within a set framework to achieve common goals. Livewell Development Accreditation was similar but took this further in that organisations with no common goals were working towards a common framework to be scored. These tools all provided a structured approach to setting priorities and achieving outcomes that facilitated decision making through project team discussion.

- **Optioneering.** Taking a more metric focused approach, decision-making in later stages of project development is facilitated by some tools through optioneering. B&ST and Natural Capital Planning Toolkit both do this, based on a somewhat mature methodology of natural capital. This forecasting of potential outcomes in a quantified way allows for a robust evidence base when choosing between more detailed design options.

These three ways of influencing decision making can all be deliberate outcomes of a tool, but by having more than one purpose the tool will become more complex and resource intensive. It will be necessary to define the aims for each if wanted to include the tool.

2.2.4 SUMMARY: RELEVANCE FOR BETTER PLACES TOOLKIT:

The prevalence of tools which closely align with, but don't fully satisfy the needs of the Better Places Toolkit, is evidence that this is an arena that has a lot of support and attention from different stakeholders in the built environment.

There is enthusiastic movement towards building better places in a more general sense, and when comparing this against movements in placemaking guidance and social value measurement it is clear the detailed methods and processes behind creating more standardised best practice are maturing.

However, this is a complex meeting of socio-technical challenges in a context driven by political and environmental concerns, so there will not soon be a one-size-fits-all solution for all built environment projects. Therefore, the Better Places Toolkit will be one part of the wider solution that focuses on early stages in strategic land development. The challenges in developing the Better Places Toolkit will include:

Firstly, applying social value thinking to have impact on such a large scale as a new strategic community development will require more than scaling up existing methods. The social value measurement that works best has slowly grown from smaller, more easily contained projects where the users and stakeholders are more clearly defined. The resources needed to explore social value on such scales sometimes are not justified by the benefits of being able to report. It is by developing this thinking further that we will be able to engage with decision making and create positive impact with the toolkit.

Secondly, finding new ways to measure the most difficult but most meaningful aspects of social value is a complex problem that will require the inclusion of community involvement and feedback. Previously applying social value tools at larger scale has resulted in reducing the metrics used to ones which are robust, evidenced and justified. In the meantime, reducing social value to exclude the more intrinsic benefits. However, in creating better places those intrinsic benefits need to be made explicit in the best way possible to understand what it is that makes a new community good. We need to determine the data needed to align with the best principles being used.

And third, to influence decision making we must make a tool that produces what people need in a way which is useful, accessible, and has potential for industry buy in. With several existing tools and frameworks, we need to determine the best design for Better Places Toolkit that meets the needs of those we identify as the key user groups. This is about good design for usability, good content for quality outputs, and meeting a need that asks for reasonable resource inputs for the desired output.

The next stage of the Better Places Toolkit project will be to revisit the tools and frameworks reviewed in parallel to designing the methodology we will use. This will answer the key questions of data, usability and impact of a new toolkit in this space.

3 RECOMMENDATIONS FOR NEXT STEPS

The purpose of this report was to review a range of existing tools that may have relevance for the development of the Better Places Toolkit and to check our assumptions that there is a gap in existing practices and a need for a new tool.

In this section we focus on the potential tool users and the subsequent tool design. User needs are discussed with the considerations of how this will influence the tool design, along with an early mapping of relevant stakeholder groups. Three high level options are set out for the development of the Better Places Toolkit.

Following this a list of considerations for the design of the tool are outlined, focussing on the users. Finally, we pose a set of questions for workshop attendees to consider if our review has appropriately answered the key research questions.

3.1 USER NEEDS

Central to the core aims of the Better Places Toolkit project is to ensure User-Centred Design.

We want to create a tool that directly responds to the needs of those who will use it, creating an intuitive interface that makes it a usable and useful tool.

The aim of creating a GIS based tool that draws on wide data sets and inputs is to create a tool that is most impactful, that has outputs which are directly useful to identified project team members.

Without feedback from key stakeholder and user groups, we will not be able to design a tool that meets the key project and industry needs.

Table 3. User requirements to be considered for the Better Places Toolkit design.

DEFINITION OF SOCIAL VALUE FOR THIS CONTEXT	TYPOLGY?
LEVEL OF DETAIL WANTED	<ul style="list-style-type: none">▪ What measurements will be used?▪ Metrics?▪ Quantification/ monetisation?
WHAT WILL THE TOOL LOOK LIKE?	<ul style="list-style-type: none">▪ Will it fully embed within another tool/ process?▪ Will it be a process that includes wider guidelines than the tool specifically (more of a toolkit)?▪ Will it be a full standalone tool?
WHO WILL USE IT?	<ul style="list-style-type: none">▪ What level of detail do they want?▪ How will they use the output?▪ How will the outputs be communicated to others?
WHAT STAGE OF A PROJECT WILL THE TOOL BE USED AT?	<ul style="list-style-type: none">▪ At what stage of decision making can it influence?▪ More than one?▪ Will it be revisited? Embedded in later stages?
WHAT IS THE PURPOSE?	<p>To provide a strict set of metrics to be assessed against at a later stage?</p> <p>Higher level outputs which can influence discussions?</p> <p>To create reports that feed into standard procedures e.g planning applications?</p> <ul style="list-style-type: none">▪ Facilitate stakeholder engagement?▪ Which stakeholders?▪ Does that include community?
HOW WILL EXISTING, FUTURE OR POTENTIAL COMMUNITIES BE INVOLVED IN THE TOOL?	<ul style="list-style-type: none">▪ In the development of the tool design▪ As outlined in the data collection

3.1.1 MAPPING KEY STAKEHOLDERS AND POTENTIAL USER GROUPS

To understand who we are working with and for when developing the Better Places Toolkit, mapping out core stakeholder groups has been useful to track discussions, feedback and input. These stakeholder groups may at a later stage form user groups, but that will likely need a more detailed breakdown within each category.

It is essential to understand that different stakeholders would be interested in the Better Places Toolkit for different reasons, and the outputs of such a tool would be used in different ways.

COLLABORATORS	SOCIAL VALUE INTEGRATORS
BETTER PLACES TOOLKIT BUILDING: DEVELOPING ON THOUGHT LEADERSHIP WORK ALREADY EVIDENCED IN THE SECTOR <ul style="list-style-type: none">VuCityQuality of Life Foundation (URBED, Commonplace)What Works WellbeingCHYSocial Value PortalFuture Places (Exeter)	BETTER PLACES TOOLKIT CHAMPIONS: CONNECTING INTO EXISTING SOCIAL VALUE HUBS <ul style="list-style-type: none">Construction Innovation HubBREACEUKGBCNational Infrastructure CommissionConnected Places CatapultCentre for Digital Built BritainIndependent Transport Commission
TARGET AUDIENCE	INDUSTRY INTEGRATORS
BETTER PLACES TOOLKIT USERS: UNDERSTANDING THE NEEDS AND WANTS TO SHAPE THE TOOL DESIGN <ul style="list-style-type: none">GrosvenorUKRegenerationUrban&CivicBerkeleyTaylor WimpyKey StakeholdersWider target audience such as Local Authorities	BETTER PLACES TOOLKIT IMPLEMENTATION: SPEAKING THE RIGHT LANGUAGE TO RESPOND TO WIDER INDUSTRY REQUIREMENTS <ul style="list-style-type: none">Public bodies and policy makersHomes EnglandMinistry of Housing, Communities and Local GovernmentDepartment for Transport

Figure 3. Key stakeholder groups for Better Places Toolkit use.

Depending on subsequent feedback that may shape and refine the recommendations and conclusions in this report, further stakeholder engagement will be necessary to continue a user-centred design approach to the tool development. This will continue with identified key external stakeholders and the internal steering group, iteratively designing the tool to respond to feedback.

Engagement will also be needed with the organisations who have proved key in connecting into an open and possible collaborative shared learning. We will need to work closely with the maturing specialist base to align how workstreams may come together and support each other.

3.2 THREE OPTIONS FOR THE BETTER PLACES TOOLKIT MOVING FORWARD

Based on the consideration of user centred design, three possible routes to move forwards with the Better Places Toolkit have been identified. These three pathways can be generally described as standalone, plugin and fully integrated in terms of the structure of the tool design.

Table 4. Three options for Better Places Toolkit development.

	OVERALL DESIGN	ADVANTAGES	DISADVANTAGES
OPTION 1 Standalone	A toolkit fully developed and created by Stantec, but open access for others to use. Might have the GIS based tool, with a wraparound service making up the "toolkit". This would be a full suite/ library of social value guidance in strategic land development. Similar tool structure: Greenkeeper as standalone tool	<ul style="list-style-type: none">Can create a process and methodology that responds directly to identified gaps.Freedom in the shape the tool takes	<ul style="list-style-type: none">Resource intensiveMay not have the same appeal to those who want standardised approaches on projects
OPTION 2 Plugin	A GIS tool developed by Stantec, that will be able to be integrated into other programmes/ tools (such as putting layers on maps?) May be closely connected with another organisation. Similar tool structure: Construction Innovation Hub value toolkit	<ul style="list-style-type: none">Aligning with other tools or platforms will increase the usability and useful outputs	<ul style="list-style-type: none">•To be compatible with other tools or platforms may limit what can be included in the tool
OPTION 3 Fully integrated	A better places (social value) tool which has been developed using another existing organisation/ platform as the foundation. Ownership could sit outside Stantec. Similar tool structure: BREEAM Communities framework	<ul style="list-style-type: none">By fully integrating with an independent body the tool can be built on robust foundations	<ul style="list-style-type: none">Possible limitations around what types of social value are being measuredLonger timescale to developMore resource intensive to use

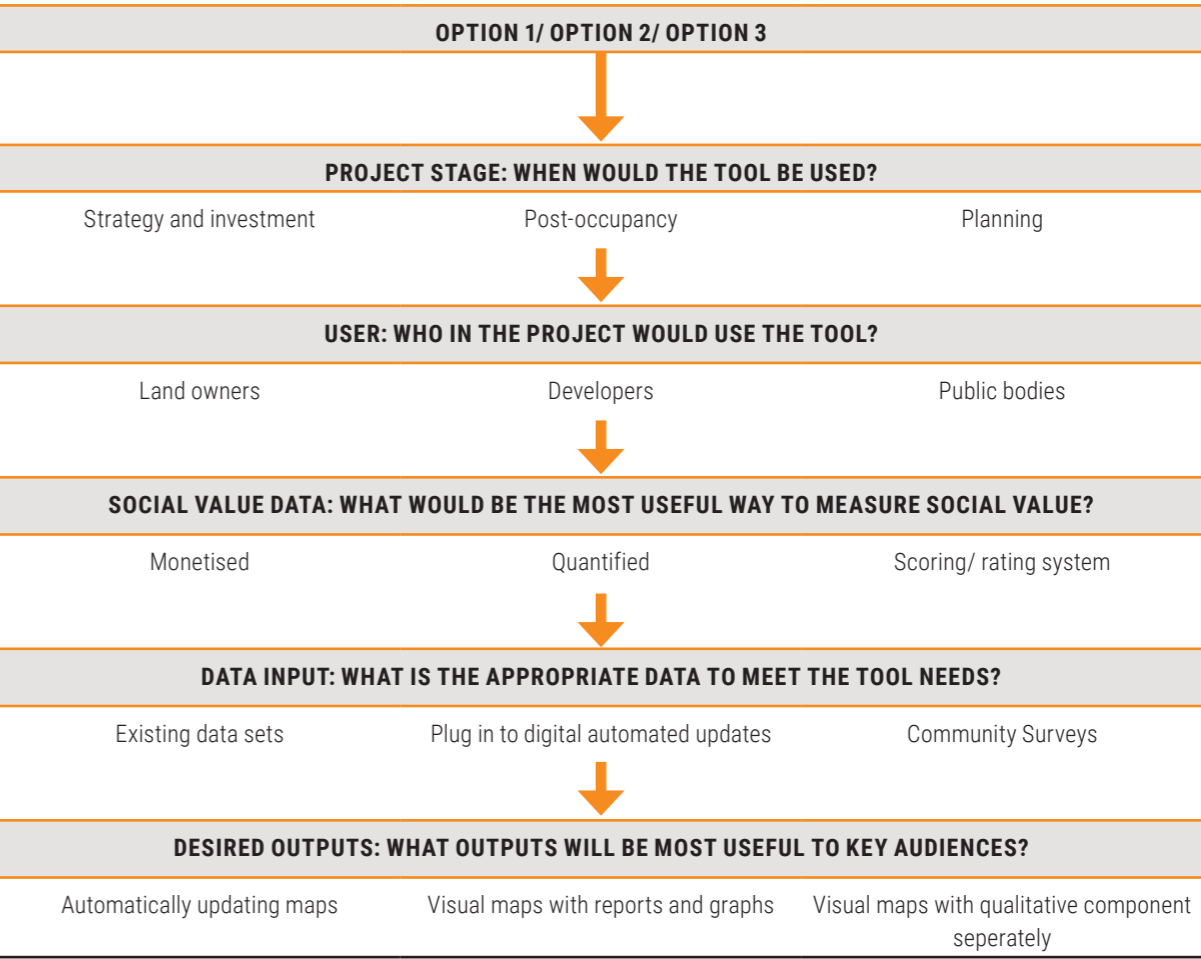


Figure 4. Better Places Toolkit design decisions to be made depending on user needs: creating a useful tool

3.2.1 ENLISTING FEEDBACK ON DESIGN OPTIONS IN THE STAKEHOLDER WORKSHOP

As stated previously, key to designing and creating a successful Better Places Toolkit is keeping the relevant stakeholder needs central to the development. Stakeholder engagement has been a core principle to the Better Places Toolkit since conception, as the Better Places Toolkit needs wider behaviour change and acceptance in industry to be most impactful. Consistent stakeholder engagement will keep Better Places Toolkit relevant and up to date with current thinking.

User-centred design builds on the principles common in software and web development which ensures platforms and tools are developed which are easy to use, accessible, but also at their core fulfilling a need by delivering outputs which are useful and impactful. Taking this user-centred design approach means we shape our stakeholder engagement to get the right feedback from the right people to help create the right Better Places Toolkit.

What we are asking from our identified key external stakeholders is to provide feedback on the existing tool review. For Stage 1 of the project this culminated in a workshop, held in December 2020 with 8 participants who were invited for their specific expertise and knowledge. We posed a set of questions to our workshop participants to ensure our review has reached conclusions relevant to industry needs. They are listed below, probing around the key review research questions.

To explore the need for a new tool, the following questions were explored:

- What tools or practices exist, and how widely are they used?
 - Are there any tools you feel we have missed?
 - Are any of the tools highlighted not actually useful in your experience?
 - Do any of the tools listed satisfy your needs already?
- What gaps or opportunities exist between established tools and practices?
 - Are the gaps in existing tools true to life?
 - Would the data we are proposing to produce as part of the Better Places Toolkit fulfil a gap in projects? (spatially mapped, wider social value outcomes)
- What do users want to see from tools, and how/ is this currently being met?
 - Have we correctly assessed the need for such a new tool in strategic land development?
 - What stage of the project is key to embedding social value in decisions?
- What would be beneficial and impactful in a new tool? How would it address user needs and gaps in existing tools and practices?
 - In your experience of strategic land development projects, do you see a standardised approach to introducing value based decision making as a realistic goal?
 - Of the 3 options offered for moving forwards, which do you see as most appealing the projects you are involved in?

3.3 NEXT STEPS

The aim of the Better Places Toolkit is to develop a tool that makes it easy to incorporate social value into decision making around the use of land. This review and stakeholder engagement constituted Stage 1 of 6 across the two-year project. The next stage of the Better Places Toolkit project will be building directly on the recommendations and conclusions drawn from this review and the evaluation of the options by the Advisory Group.

3.3.1 IDENTIFIED TOOL REQUIREMENTS

Following from Stage 1 findings, the tool

The review was partly to reflect on what works best in the design of existing tools and frameworks. The tools reviewed broadly fell across a spectrum of tools that are used on their own within project teams, to tools which are aligned with external frameworks and comparable across projects. The feedback from the stakeholder workshop in response to our recommended options agreed that something like Option 2 (plugin) would be best as it could be flexible for differing needs of users. On the tool design the following points were agreed:

- Rescope who the key audience and users are. We should look beyond private developers and include local government, among others.
- There isn't a need to focus on one part of the project cycle, this tool could be used throughout to follow how decisions shape outputs and impacts.
- Try to not commit to only one social value framework, have themes that are flexible and work for all.
- Prioritise creating open source data and methods that others can use. Making it open source widens who can use it, and in different ways.
- People want evidence for their decision making – data will provide this. This could also challenge the way land value is communicated, and therefore traded.
- Monetisation can be useful to make things comparable and in one language. Quantification of some sort should be the goal if full monetization isn't needed.
- Visual mapping of social value all agreed as a very useful output.

Considering the benefits and disbenefits of differing tool design, our preferred approach is to create an open access tool, which connects with and contributes to other tools and frameworks were possible. The detailed design of the Better Places Toolkit will later be refined and shaped by the needs of the primary user and the identified key audience.

3.3.2 STAGE 2 PLAN OVERVIEW

Stage 2 focuses on developing up a detailed methodology over four months to shape the tool development: both the metrics to be included (along with data sources) and the design of the tool. Revisiting the tools which have proven to be most relevant and useful to gain further insight to the detail behind metrics and processes included will be essential to designing the methodology. Following this will be a six-month period (Stages 3 and 4) of trialling the tool prototype on identified exemplar projects to refine the outputs, usability, and community response.

STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5	STAGE 6
Understanding the social value in the context of academia, industry and clients, and raise client and industry awareness.	Develop options for methodology and prototype Better Places Toolkit.	Piloting the Better Places Toolkit.	Community Consultation and Better Places Toolkit Evaluation Running parallel with Stage 3, will enable the evaluation of the BPT against the reality on the ground.	Refinement of Better Places Toolkit and early-stage Commercialisation.	Outputs and Dissemination of BPT.
KEY OUTPUTS: <ul style="list-style-type: none">Understanding of social value definition, metrics and practices in the context of land developmentEstablishment of an external Stakeholder Group.Design of a Better Places Symposium.	KEY OUTPUTS: <ul style="list-style-type: none">A prototype of the BPT, incorporating the elements above and forming the basis of Stage 3Plan of when the BPT will be trialled in a series of pilot projects.	KEY OUTPUTS: <ul style="list-style-type: none">A completed pilot study of the BPT	KEY OUTPUTS: <ul style="list-style-type: none">knowledge and understanding of community consultations methods.a community consultation for pilot project(s).comparison of actual and predicted social value outcomes.	KEY OUTPUTS: <ul style="list-style-type: none">BPT version 1.0 completedInitial strategic land development and social value consultancy projects secured.	KEY OUTPUTS: <ul style="list-style-type: none">Complete project documentation including Company Brief.Technical User Guide.Training and Communication programme.Marketing material.Research paper.

Figure 5. Two-year plan for Better Places Toolkit project

The specific outputs of Stage 2 will include:

- Review of possible methodologies for the Better Places Toolkit.
- Identify suitable data and analytical techniques to include and use in the Better Places Toolkit.
- Project team meeting and presentation to Stantec technical TEG group to agree methodology for Better Places Toolkit (pending feedback from stakeholder group).
- Deliver stakeholder meeting on Better Places Toolkit prototype plans and capture feedback.
- Better Places Toolkit prototype built.

The stakeholder meeting central to ensuring the toolkit development is continuing to respond to industry needs has been provisionally agreed with participants for March 2021.The Better Places Toolkit prototype is planned to be completed by April 2021, to then roll out for testing on yet to be finalised case study projects.

It is planned that the Better Places Toolkit project team will continue consistent stakeholder engagement to share learning, disseminate industry relevant information and enlist further feedback to ensure what is being delivered continues to be focused on user-centred design.

4 A NOTE ON METHODS

4.1 STAKEHOLDER ENGAGEMENT

Stakeholder engagement to date has been delivered through three strands of communication and engagement, summarized in the table below as internal steering group, tool specific engagement interviews and meetings, and external stakeholder feedback.

These have provided guidance to shape the review objectives, identify key tools to review, provide detail on usefulness of tools, and ultimately provide feedback on the conclusions and recommendations produced from the des review.

Table 5. Three stakeholder communication strands

	WHEN ARE THEY INVOLVED	KEY INPUT
Internal Steering Group	At beginning of desk review.	<ul style="list-style-type: none">▪ Early insight to industry need.▪ Experience of using tools on projects.
Tool specific engagement	During desk review.	<ul style="list-style-type: none">▪ Experience of using tools on projects.▪ Detail and usability of tool.▪ Learning from metrics and process of tools.
External Stakeholder Advisory Group	When drawing conclusions of desk review and making recommendations.	<ul style="list-style-type: none">▪ Sense check conclusions and recommendations.▪ Provide insight to industry need and appetite for solutions proposed.

4.2 DESK REVIEW

The desk review involved looking at reports, guidance documents, web pages and the tool interface and content.

To review existing “tools” was an open ended step, as existing tools which fulfil the same criteria as the indented Better Places Toolkit outputs was limited, but extending the search beyond directly relevant tools brought dozens of results.

Table 6. Desk review process.

CREATING THE LONGLIST	
Snowballing from key stakeholder input and previous experience. Infilled with searches results for:	
SEARCHED FOR	AGAINST
<ul style="list-style-type: none">▪ Tool▪ Toolkit▪ Framework▪ Appraisal	<ul style="list-style-type: none">▪ Social value▪ Sustainability▪ Social impact▪ Placemaking▪ Wellbeing▪ Community▪ Quality of life▪ Land development▪ Housing▪ Benefits
A tool was included on the long list by meeting more than 1 of the following criteria: <ul style="list-style-type: none">▪ UK relevance▪ Land development outcomes relevant▪ Social value outcomes focused▪ Relevant processes for Better Places Toolkit▪ Robust, full framework approach, tool (not general conceptual approach)▪ Can be applied widely (not organization specific)	
LONGLIST REVIEW: 66 THIS LONGLIST WAS THEN REFINED TO A SHORT LIST FOR MORE DETAILED REVIEW (17).	
Choosing tools for more detailed review depended on satisfying more than one criterion of: <ul style="list-style-type: none">▪ Land development focused▪ Relevant metrics (social value focused on wider outcomes of strategic land development, not construction & delivery)▪ Relevant process (spatially mapping or digital interfaces)▪ Widely used: demonstrating usefulness or acceptance of accreditation	
The short list tools were reviewed against the following criteria:	
<ul style="list-style-type: none">▪ Owner/ designer▪ Methodology, tool, appraisal framework, or approach?▪ Date (first version; most recent version)▪ Sector focus▪ User▪ Audience▪ Typical outputs▪ Learning from: Process▪ Learning from: Metrics▪ Learning from: Defining Scope▪ Region of application▪ Key theme (social/ enviro/ economic/ all?)	<ul style="list-style-type: none">▪ Key findings▪ Theory/ concepts underpinning▪ Robustness▪ Benchmarking▪ Project stage: metrics focus▪ Project stage: when used▪ Relevance for Stantec▪ Relevance to land development▪ Relevance for Better Places Toolkit▪ Related tools▪ How widely used is the tool?▪ Cost to use (Resources needed)▪ How useful is the tool?

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We care about the communities we serve—because they're our communities too. This allows us to assess what's needed and connect our expertise, to appreciate nuances and envision what's never been considered, to bring together diverse perspectives so we can collaborate toward a shared success.

We're designers, engineers, scientists, and project managers, innovating together at the intersection of community, creativity, and client relationships. Balancing these priorities results in projects that advance the quality of life in communities across the globe.

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