



TOOLKIT SERIES

# Social Value Storyboard Template

Supporting a more strategic approach to responding to social value merit criteria or tender requirements

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# 1. Introduction

## 1.1 Purpose

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The **Social Value storyboard template** has been designed to help proponents develop a structured and considered approach to addressing merit criteria at the tender stage. This template should be used in the planning stage of developing a social value tender response.

A **Social Value Storyboard template** should be completed early in project development as a strategic step in helping you to structure your social value tender response. It ensures clarity and alignment across your team and ensures you will be able to more effectively outline your proposed social value commitments and approach.

The information gathered and prepared through this template may assist in conducting a **Local Needs Assessment** to obtain a more detailed and granular understanding on the community impact by the project.

### The template can be used to:

- **Encourage Alignment with Tender requirements** – support proponents to structure responses that best facilitates a considered approach to addressing key merit criteria before preparing a response.
- **Communicate Social Value approach** – support proponents to develop a logical and considered approach to how social, economic and environmental benefits may be delivered and embedded into the project.
- **Embedding community needs** – encourages proponents to consider from the earliest stage of tender development the needs, concerns and aspirations of the community.
- **Commitment to Social Value** – ensures response is best places to go beyond compliance and nurture a strategic approach that delivering long lasting social value and impact.

Using a **Social Value Storyboard Template** may support you to develop a more cohesive, strategic and considered social value response that will support to shape the social value approach prior to project delivery.

## 2. Key Considerations

Before completing the Social Value Storyboard template, it is recommended to review the following key considerations.

Consideration	
1	Collaborate across your organisation to establish a social value working group to collaborate on proposed approach to meeting the requirements. This is the opportunity to consider what other activities your organisation already does and how you can work in partnership with other organisation to maximise impact.
2	Conduct and carry out research to understand the location and profile of the community. Begin outlining based on the initial desktop research some potential social value options, activities and potential commitments. Also recommended to complete a Local Needs Assessment and Theory of Change exercise for the project concurrently
3	Explore in more depth the local needs of the community and consider how the project and your organisation can continue to support those needs through social value commitments.
4	Engage with teams across your organisation to secure buy in for social value and the specific commitments made for the project.
5	Plan and consider the resources and budget that will be required to deliver the social value commitment. This includes consideration of resources for programs, initiatives or staffing, e.g. Social Value Project Lead.
6	Provide specific detail and outlines how you will deliver the commitments. This includes providing facts, figures, dates, places, names, objectives an overarching KPIs. As you develop this, continue to ensure the commitments are reflective of local needs and local stakeholders' aspirations.
7	Provide details of local examples or case studies where you have done this before to demonstrate a legacy of meaningful social value delivery. An example could include a detail of an employment program delivered on a similar project, or where your organisation has collaborated with other operators or proponents to maximise collective impact. Make sure to provide detail of what the commitment, how it was delivered and what the key social value outcomes were.
8	Outline how you will work with local partners to support delivery of your commitments.

### Tip:

It is recommended that you conduct a Local Needs Analysis and complete a Theory of Change exercise concurrently while developing social value tender response to ensure ongoing alignment with local needs and commitments made during tendering.





# 3. Storyboard Template

As you prepare this template, remember to follow the following principles:

- **Do your research** – important to understand community, merit criteria and other policy requirements that you are responding to.
- **Specify** – Don't be vague, make commitments that are tangible, proportionate, specific and measurable that reflect local need.
- **Understand what is required** – Don't assume what a community wants, ensure response accurately reflects community aspirations and view to inform social value approach.
- **Collaborate** – Get creative, collaborate with colleagues, or other organisations to understand what they are doing in the social value space and how that knowledge can inform your approach.

# 3.1 Social Value Storyboard Template

Consideration	Response
<b>Overview</b>	
<b>Project</b> <i>Outline name, location and scope of project</i>	
<b>Author</b> <i>Identify key author/s who will be developing the social value response, e.g. Social Value Lead</i>	
<b>Date</b>	
<b>Social Value Weighting</b> <i>Outline the weighting of the social value merit criteria, e.g. 25%, etc.</i>	
<b>Merit Criteria</b> <i>Outline the specific social value merit criteria the response will need to address</i>	
<b>Social Value vision</b> <i>Outline the initial social value vision for the project, e.g. Boosting Economic Opportunity, Increasing First Nations Participation, Delivering Social Value Legacy</i>	
<b>Case studies</b> <i>Provide case studies that outline history and legacy of delivering social value and social value commitments</i>	
<b>Understanding Local Context</b>	
<b>Key Stakeholders</b> <i>E.g. key communities, First Nations groups, businesses and other relevant stakeholders</i>	
<b>Region</b> <i>E.g. outline key nearby population centres, and high-level socio-economic profile</i>	
<b>Government bodies</b> <i>E.g. list relevant local, state and federal agencies, councils or authorities associated with project location</i>	
<b>Socio-Economic Challenges</b> <i>E.g. highlight key community needs and aspirations</i>  <i>Note: a separate Local Needs Assessment can provide a more detailed understanding of the community to inform social value approach.</i>	
<b>Collaboration and Partnership</b> <i>E.g. Identify existing partnerships, programs or initiatives that the project could align with or contribute to maximise social impact</i>	

Consideration	Response
<p><b>Policy Considerations</b>  <i>E.g. outline any key local, state or federal policies that the project will need to consider</i></p>	
<b>Engagement</b>	
<p><b>Engagement Approach</b>  <i>E.g. Outline how the project will engage or has engaged with communities, First Nations peoples and other key stakeholders</i></p>	
<p><b>Engagement Activities</b>  <i>E.g. Provide insight into any past, or planned events to engage with the community to inform social value approach</i></p>	
<p><b>Feedback Mechanisms</b>  <i>E.g. How any community feedback has been captured, assessed and shaped proposed social value approach for project</i></p>	
<b>Governance, Risk and Reporting</b>	
<p><b>Delivery</b>  <i>E.g. who will be responsible for implementing and managing any social value commitments</i></p>	
<p><b>Monitoring and Evaluation</b>  <i>E.g. what metrics, KPIs, or reporting processes will be used separate to mandatory reporting templates to capture best practice and outcome generation</i></p>	
<p><b>Accountability</b>  <i>E.g. how would you report back to the community throughout the project to report on progress</i></p>	

