INTRODUCTORY

ASL

TOOLKIT SERIES

Social Value Project Charter

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Artwork credit: The 'Journey of unity: AEMO's Reconciliation Path' was created by Wiradjuri artist Lani Balzan.

The ASL Social Value Toolkit tools and guidance are structured across three levels to support the gradual development of social value capability and maturity.

INTRODUCTORY

Builds foundational understanding and capability in social value practice.

INTERMEDIATE

Builds on foundational capability to support more developed social value practice.

ADVANCED

Supports established capability and more mature social value practice.

Things to remember

A Social Value Charter supports project stakeholder collaboration, shared commitment and sets intentions for partnership working. Social Value Charters can set out your high-level ambition and vision for the project to deliver against social value commitments and support social value generation.

A Social Value Charter communicates the principles guiding the social value delivery approach for the project and established a high-level framework which all key stakeholder and partners will operate from throughout the duration of the project.

Ahead of developing your Social Value Charter, it is important to consider the following:

Define the purpose

Before commencing development of a Social Value Charter, please consider:

- Why does social value matter for this project?
- Who will benefit from any social value commitments? (e.g. Local businesses, First Nations Communities, local workforce, etc.)
- How will the commitments you have made be delivered, and who will be responsible for ensuring outcomes are generated?
- Consider what success looks like (e.g. job creation, capability development, supply chain resilience, etc.)

Determine social value principles

Overarching principles guide and provide direction on how the project will deliver against any social value commitments.

These guiding principles should be tailored to the specific needs of the community, project's scope, and the commitments made at tender stage.

Implementation and action

For a Social Value Charter to be successful, you must consider how any commitments or principles outlined in the charter will be actioned. This includes considering:

- How social value will impact decision making on your project.
- Who will be accountable for social value and establishing clear roles and responsibilities within the project team.
- Committing to transparent reporting to track impact.

General guidance

Once the purpose, principles and implementation approach has been considered, it's important to remember that a Social Value Charter should be:

- Written in clear and accessible language.
- Endorsed by leadership and the project team.
- Shared with key partners and stakeholders.
- Be a live document that is updated on a regular basis based on the current scope and stage of the project.

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1. Introduction

1.1 Purpose

Tip:
Defining the overarching purpose is the foundation of the Social Value Charter. The purpose should outline the project's commitment to delivering meaningful and long-lasting social value, benefits for First Nations peoples, local communities, and businesses.

The purpose should clearly define the why behind the social value and social licence efforts and highlight any key policy, contract or stakeholder priorities.

Example Social Value purpose statement

This Social Value Charter has been developed to ensure that this project delivers long-term social, economic and environmental benefits for First Nations people, local communities and industry. We are committed to genuine engagement with First Nations and local communities and will work in partnership to co-design approaches to capturing the opportunities presented by this project.

We aim to leave a legacy that strengthens the community, enhances capability and supports an equitable energy transition.

1.2 Project overview

Tip:
This section should outline key details of the project. It should provide a clear and high-level summary of the project to ensure stakeholders understand the role of the project in delivering social licence commitments and social value generation.

Example Project Overview Structure

No	Item	Overview
1	**Project Name**	e.g. the official project name
2	**Description**	e.g. brief description of the project and alignment with social value commitments
3	**Location**	e.g. specify the geographic area where the project will be delivered, including key regions, communities, or local government areas impacted
4	**Project timeline**	e.g. overview of major project phases and delivery timeline (construction, operations, etc.)
5	**Any key stakeholders**	e.g. list any organisations or groups you will be working with to deliver the project.

1.3 Vision and mission

1.3.1 Vision

Tip:
This section should outline the overarching vision and mission of the project to deliver social value. This could encompass detail on how the project is intended to improve social outcomes and drive tangible benefits.

Example Project vision

Our project is committed to delivering an equitable energy transition by embedded partnerships, economic empowerment and tangible benefits for First Nations Peoples and local communities. Through inclusive engagement, workforce development and collaboration we aim to create a social value legacy.

1.3.2 Mission

Tip:
To underpin the vision of the project from a social value perspective can be supported and made more robust by outlining the core mission and pillars of the project to generate social value.

Example Social Value Mission Statements

This project will be guided by three core mission statements to promote social licence and social value generation.

Mission 1: Empowering First Nations participation and self-determination

We are committed to genuine partnership, collaboration, and co-design with First Nations peoples, to ensure their voice shapes and influences the delivery of our project, and the long-term legacy. Through co-designed initiatives, we aim to build capacity and opportunities that will support self-determination and create long term social value that provides tangible and relevant benefits for First Nations peoples.

Mission 2: A skilled and inclusive workforce

We will maximise opportunities for the local workforce and supply chain by strategically investing in skills development, supply chain resilience and employment pathways. Our project has a mission to strengthen the local regional economy and provide workforce participation opportunities for underrepresented groups.

Mission 3: A lasting social value legacy

We will collaborate with the local community to deliver shared value and community benefits. Our project will embed community priorities and needs into our project delivery approach. The project is committed to delivering benefits, and providing transparency to ensure we build trust, enhance social licence and contribute to sustainable local growth.

2. Charter principles and objectives

Tip:
This section should outline what the overarching principles are of the charter, that will drive the approach to social value creation and social licence. These principles should be embedded into all core stages of project delivery to maximise impact.

2.1 Overarching project social value principles

Example Principles

Our project will be guided by a core set of principles to ensure we are collectively delivering tangible social value. We will do this by embedding First Nations participation, economic development, equity and community benefits through genuine partnerships and collaboration with First Nations and local communities.

No	Principle/Objective	Overview
1	**Meaningful First Nations partnerships**	Embed genuine and ongoing engagement with First Nations peoples. Shifting focus from consultation to co-design initiatives, ensuring a culturally appropriate process for delivering outcomes that reflect First Nations communities' priorities.
2	**Local economic and workforce development**	Maximise local employment and supply chain opportunities, ensuring there is where appropriate Australian industry participation in the project. Establish skills and employment programs, apprenticeships and other initiatives that grow regional capacity and economic development.
3	**Community benefits and social value legacy**	Nurture trust through transparent engagement and collaborative decision making with the local community. Work with community to align initiatives with local needs and establish long term approach to community benefits.
4	**Inclusive practices**	Promote inclusive employment practices and supply chain diversity to promote equal opportunity. Work with First Nations businesses, women in energy and other underrepresented groups. Commit to fair wages and safe working conditions across project delivery.
5	**Capacity building**	Ensure the project's benefits extend beyond delivery phase by working with the local community to support capacity building. Support knowledge sharing initiatives that empower local capability and contribute to long-term resilience of communities.

3. Delivering social value outcomes

Tip:
To ensure your commitments will deliver tangible benefits and social value, within this section it is recommended to outline at a high level the actions that are being undertaken or planned to support the delivery of the desired social value outcomes.

3.1 Bridging Ambition to Action

Tip:
This section should outline the high-level steps that will be taken to ensure the vision, mission and overarching principles and objectives of the project are delivered. The detail in this section should provide insight into the social value approach to the project and help complement other more specific social licence commitments made Tender Merit Criteria, as relevant.

Example Principles/Objectives, and Steps to Action

No	Principle/Objective	Overview of steps to achieve objective
1	**Meaningful First Nations partnerships**	• Establish First Nations Partnership advisory group to guide project delivery and decision making. • Design and implement co-designed and culturally appropriate engagement framework. • Explore and establish partnerships with First Nations businesses and supply chain partners (e.g. Supply Nation or local Indigenous Chambers of Commerce, etc.) • Rollout cultural awareness training for all project teams to ensure ongoing culturally safe and respectful engagement with First Nations communities.
2	**Local economic and workforce development**	• Develop a Local Industry Participation Plan to prioritise Australian suppliers and contractors where possible. • Create skills and employment pathways, apprenticeships, and traineeships. • Establish partnerships and collaborate with regional training providers, universities, and TAFE to deliver and develop accredited skills programs.
3	**Community benefits and social value legacy**	• Undertake ongoing Local Needs Assessment through project delivery to ensure social licence approach continues to identify and reflect local priorities. • Maintain transparent and transparent community feedback loops, to support building trust with local community. • Appoint dedicated Social Value lead to ensure commitments and any targets set during the tender stage are delivered in partnership with the community and other relevant stakeholders.
4	**Inclusive practices**	• Implement inclusive recruitment policies, ensuring opportunities are promoted for underrepresented groups. • Establish Supplier Diversity working group and promote high labour standards. • Provide ongoing mentorship initiatives and programs throughout project's delivery to support career development and employment pathways for underrepresented groups.
5	**Capacity building**	• Develop capacity building program to empower First Nations businesses and local communities through construction and operational phase. • Co-design with community education and knowledge sharing initiatives, creating resources for schools, training providers, local businesses, and other industry stakeholders. • Capture lessons learnt and work with research institutions or other industry groups to develop best practice guidance, to support broader industry advancement in social licence.

4. Charter implementation

Tip:

In this section, insert details of how the Social Value Charter will be implemented – this is the section that outlines how and who will be part of the delivery.

Example implementation statement

Social Value Charter signatories will commit to supporting the commitments outlined and will provide a detailed account of deliverables on a quarterly basis. The commitments made at the time of bidding for this contract will form a core part of the project and will be reviewed as part of the on-going project progress meetings and reporting.

To support implementation of this charter, we commit to:

- Establish clear leadership and accountability processes.
- Integrate social value commitments into project policies and governance.
- Assign dedicated roles and responsibilities for social licence and social value delivery.
- Embed social licence requirements and social value principles across all stages of the project.
- Establish a monthly Social Value Working Group to oversee delivery, monitor progress and drive continuous improvement.
- Provide regular and transparent reporting on progress and outcomes achieved.
- Work collaboratively with other neighbouring projects to combine efforts and maximise social value generation and long-term benefit outcomes for First Nations and local communities.

5. Charter signature/s

Tip:
All members of the charter should sign and commit to the scope of the Social Value Charter.

Name	
Position	
Company	
Date	

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