



TOOLKIT SERIES

Social Value Action Plan

A practical template for planning, delivering and tracking social value commitments across the project lifecycle, including governance, implementation actions and measurable outcomes.

Version 2, October 2026

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ASL acknowledges the Traditional Custodians of the land on which we live and work. We pay our respects to Elders, past and present.

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.

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Introduction

A Social Value Action Plan (SVAP) sets out how a project will deliver measurable social, economic, and community benefits over its lifecycle. It translates social value and First Nations participation commitments into clear, actionable, and time-bound tasks that are embedded into project delivery and tracked over time.

The SVAP is the primary implementation tool for social value on a project. It supports the project team to plan, manage, and demonstrate progress against commitments throughout the project duration.

Top tips

When to develop the SVAP

The SVAP is typically developed after completing a Local Needs Analysis (LNA) and may align with the project's overarching Social Value Charter. Where possible, having the SVAP in place before project mobilisation can help ensure commitments are active from the start of delivery.



How to use this template

This template works best as a working document rather than a one-off submission. Reviewing it at minimum quarterly is generally advisable, or earlier if a significant project change occurs. The action plan table (Section 3) is the core of the SVAP. Sections 1 and 2 provide the supporting context and are worth completing first.



Examples in templates are shown in *italics*. Replace all placeholder text with your own content.



Section 1 – How to Build a Social Value Action Plan

A well-structured SVAP provides clear direction for delivering social value commitments in practice. There is no one-size-fits-all approach - the SVAP should be tailored to the specific context, scale, and risk profile of the project. The five steps below outline the key considerations for developing an effective SVAP.

1. Identify the social value commitments to be delivered.

Drawing on the Local Needs Analysis, and any relevant policy, regulatory, or tender requirements, list each social value commitment the project intends to deliver. Each commitment should be specific, realistic, and traceable to an identified community need or obligation.

2. Plan delivery of each commitment.

Consider treating each commitment as a discrete workstream. Taking time to plan delivery at the outset can help confirm feasibility, identify resourcing requirements, set realistic timelines, and surface dependencies before the project is underway.

3. Identify delivery partners and supporting organisations.

Where relevant, identify the delivery partners or third-party organisations that may support implementation of specific commitments. Documenting the nature of each partnership and what each partner has agreed to contribute can be useful. Where possible, aim to list only confirmed partners, aspirational partnerships could be noted separately until formalised.

4. Assign clear ownership and accountability.

Consider nominating a named individual, rather than a team or role title, as responsible for each commitment. Having a single person accountable for maintaining the SVAP, tracking progress, and keeping commitments visible during project delivery can help avoid gaps. The overall SVAP owner may be identified in the governance table.

5. Mobilise the plan through a kick-off workshop.

Approaching the SVAP as a live document from the outset can be valuable. A kick-off workshop with the project team and relevant stakeholders may help confirm commitments, roles, responsibilities, governance arrangements, and reporting expectations. This kind of session can be useful for testing assumptions, resolving gaps, and incorporating feedback before delivery begins.



Section 2 – Governance Details

The table below covers the governance framework for the SVAP. Completing these details and confirming them with the project team and client before delivery begins can help avoid ambiguity later.

Who completes this section?

The Social Value Lead would typically complete and maintain this table. The Executive Sponsor may review and confirm the details before the SVAP is formally issued. It is worth updating this table whenever a key detail changes, for example, if the Social Value Lead, delivery partners, or reporting requirements change during the project.

Table 1. Governance details template

Field	What to Enter	Your Response
Project Name	<i>The official project name as used in contracts and tender documentation.</i>	[Enter]
Proponent / Contractor	<i>The organisation delivering the project and responsible for social value commitments.</i>	[Enter]
Project Value	<i>Approximate contract value. Used to contextualise the scale of social value investment.</i>	[Enter]
Project Start Date	<i>Confirmed or anticipated project start date.</i>	[Enter]
Project End Date	<i>Confirmed or anticipated project end date.</i>	[Enter]
Project Location and LGA(s)	<i>The project address and the specific Local Government Area(s) within which it operates.</i>	[Enter]
Project Client	<i>The client organisation commissioning the project.</i>	[Enter]
Social Value Lead	<i>Named individual responsible for this SVAP and its delivery. One named person, not a team.</i>	[Enter]
Project Manager	<i>Named individual responsible for overall project delivery.</i>	[Enter]
Executive Sponsor	<i>The senior leader with accountability for social value performance on this project.</i>	[Enter]
Key Delivery Partners	<i>List all confirmed delivery partners at SVAP commencement. Note the partnership level (refer to LNA Partnership Maturity Framework if applicable).</i>	[Enter]
Social Value Investment (\$ value)	<i>Estimated total investment in social value delivery over the life of the project, including staff time, program costs, and funded barrier removal.</i>	[Enter]
Reporting Requirements	<i>What reporting is required, to whom, and how often. Include both internal reporting (e.g. to project manager) and external reporting (e.g. to client or regulator).</i>	[Enter]
Local Needs Analysis Completed?	<i>Has an LNA been completed? If yes, record the date and the author. If no, note what evidence base has been used to develop commitments.</i>	[Enter]
SVAP Prepared By	<i>Name and role of the person who prepared this SVAP.</i>	[Enter]
SVAP Review Date	<i>Date of the next scheduled review. Minimum quarterly. Review earlier if a significant project change occurs, such as a scope change, delay, or change of Social Value Lead.</i>	[Enter]

Section 3 – Social Value Action Plan



The action plan table on the following pages is the core of the SVAP.

It translates each social value commitment into a trackable row with a named owner, measurable target, RAG status, and evidence source.

How the table is structured

The table is organised by theme. Each theme has a header row showing the theme name. Within each theme, add one row per commitment.

The table includes an instruction row directly below the column headers - read this before completing each column. Example rows are clearly labelled and shown with a light background. Working rows have placeholder text in grey – replace all grey text with your own content.

RAG status guide

G (Green) =

Commitment is on track against the annual target. No action required.

A (Amber) =

Some concern or minor delay. Corrective action has been identified and is underway. Note the action in your review log.

R (Red) =

Commitment is behind schedule or at risk of not being delivered. Escalation to the Executive Sponsor is recommended. Documenting the issue and the planned response can support accountability.

Project stages

Use one of the following standard stage labels, or 'All Stages' if the commitment spans the whole project: Pre-construction, Construction, Operations, Decommissioning, etc.

The action plan table begins on the next page.

Social Value Action Plan template

Theme / Category	Commitment	Link to LNA	Output (what is produced)	Outcome (what changes for people)	Annual Target	Owner (named individual)	Delivery Partner	Project Stage	Y1	Y2	Y3	RAG	Evidence
Sub-category within the theme, e.g. 'Local employment', 'Apprenticeships', 'Indigenous procurement'.	The specific, time-bound social value commitment the project will deliver.	The specific LNA section or finding that justifies this commitment, e.g. LNA S4.2. If no LNA has been completed, note the evidence or policy that supports it.	What the project will produce, a measurable count or figure, e.g. headcount, hours, spend, number of programs, number of participants.	What will change for people as a direct result of the output, e.g. qualification attained, sustained employment, business growth, cultural inclusion.	The specific, quantified target for the year. Must be measurable and verifiable. Where multi-year, set a target for each year.	The named individual, not a team, responsible for delivering this commitment. One person per row.	Any confirmed delivery partners or third-party organisations supporting implementation. List only confirmed partners.	The project phase(s) this commitment applies to: Pre-construction, Construction, Operations, Decommissioning, or All Stages.	Actual result achieved in Year 1. Update at year end.	Actual result achieved in Year 2. Update at year end.	Actual result achieved in Year 3. Update at year end.	status: G = On track. A = Some concern or minor delay, corrective action underway. R = Behind schedule or at risk, escalation required.	The data source used to verify progress, e.g. payroll records, training registers, accounts payable data, supplier declarations.
THEME 1: EMPLOYMENT, SKILLS & WORKFORCE DEVELOPMENT - Addressing labour market disadvantage through targeted employment, training, and skills investment.													
EXAMPLE - For reference only. Do not copy these rows directly. Replace all content with project-specific data and evidence.													
Local employment and workforce participation	Local Employment Program	LNA Section 4.2, unemployment [X]% above state average	% of total workforce hours from target LGA postcodes	Sustained local employment: % of locally hired workers still employed at 3 and 6 months post-hire	60%+ of total workforce hours from target LGA postcodes	[Social Value Lead, named individual]	[Employment Facilitator, named organisation]	All Stages	[Enter Y1 actual]	[Enter Y2 actual]	[Enter Y3 actual]	G	Monthly subcontractor workforce submissions, validated by Social Value Lead
Local employment and workforce participation	Subcontractor local workforce requirement	LNA Section 4.2, risk of fly-in fly-out (FIFO) workforce in supply chain	% of Tier 1 subcontractor workforce hours from target LGA	Reduction in FIFO dependency across the supply chain	50%+ of each Tier 1 subcontractor's workforce hours from target LGA	[Procurement Manager, named individual]	All Tier 1 subcontractors	Construction	[Enter Y1 actual]	[Enter Y2 actual]	[Enter Y3 actual]	G	Monthly subcontractor workforce submissions, validated by Social Value Lead

Theme / Category	Commitment	Link to LNA	Output (what is produced)	Outcome (what changes for people)	Annual Target	Owner (named individual)	Delivery Partner	Project Stage	Y1	Y2	Y3	RAG	Evidence
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THEME 1: EMPLOYMENT, SKILLS & WORKFORCE DEVELOPMENT - Addressing labour market disadvantage through targeted employment, training, and skills investment.

EXAMPLE - For reference only. Do not copy these rows directly. Replace all content with project-specific data and evidence.

Apprenticeships and traineeships	Apprenticeship Program	LNA Section 4.1, Year 12 completion [X]% below national average; skills shortage in [trades] confirmed	Number of apprentices/trainees engaged by Month 3; completion rate by project end	Qualifications obtained; apprentices transitioning to ongoing employment post-project	Minimum [X] apprentices by Month 3; 80%+ completion rate	[Social Value Lead, named individual]	[Training provider / Group Training Organisation, named]	All Stages	[Enter Y1 actual]	[Enter Y2 actual]	[Enter Y3 actual]	G	Training contract register; Group Training Organisation monthly report; training provider completion records
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]

THEME 2: FIRST NATIONS PARTICIPATION - Supporting economic participation, cultural inclusion, and long-term career pathways for First Nations people.

EXAMPLE - For reference only. Do not copy these rows directly. Replace all content with project-specific data and evidence.

First Nations employment	First Nations Employment Program	LNA Section 5.1, First Nations unemployment [X]% above general population rate; SEIFA confirms economic disadvantage gap	% of total workforce hours from First Nations workers (self-identified)	Sustained employment and career progression for First Nations workers	5%+ of total workforce hours from First Nations workers; Cultural Safety Plan in place before first First Nations worker starts	[Social Value Lead and Indigenous Liaison Officer, named]	[Indigenous employment provider, named]	All Stages	[Enter Y1 actual]	[Enter Y2 actual]	[Enter Y3 actual]	G	First Nations identifier in HR system (voluntary self-ID); monthly payroll cross-reference by Social Value Lead
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]

Theme / Category	Commitment	Link to LNA	Output (what is produced)	Outcome (what changes for people)	Annual Target	Owner (named individual)	Delivery Partner	Project Stage	Y1	Y2	Y3	RAG	Evidence
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THEME 3: LOCAL SUPPLY CHAIN AND ECONOMIC DEVELOPMENT - Building local supply chain capacity and increasing economic participation of local businesses.

EXAMPLE - For reference only. Do not copy these rows directly. Replace all content with project-specific data and evidence.

Local procurement	Local Supplier Spend Target	LNA Section 4.3, limited local supply chain capacity; low subcontract spend retained in region on comparable projects	% of total subcontract spend with suppliers within [X] km of project site	Increased economic activity retained in the local region; growth in local supplier capability	50%+ of total subcontract spend with local suppliers; 20%+ within project LGA(s)	[Procurement Manager, named individual]	[Chamber of Commerce or procurement body, named]	All Stages	[Enter Y1 actual]	[Enter Y2 actual]	[Enter Y3 actual]	A	Accounts payable by supplier postcode; monthly report by Procurement Manager
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]

THEME 4: COMMUNITY BENEFITS - Delivering direct benefits to the wider community, including health, wellbeing, and social infrastructure.

EXAMPLE - For reference only. Do not copy these rows directly. Replace all content with project-specific data and evidence.

Add the sub-category relevant to this project.	Describe the community benefit commitment.	Reference the LNA finding or policy obligation.	Define what the project will produce.	Define what will change for community members.	Set a quantified annual target.	Name the individual responsible.	Name any confirmed delivery partners.	Specify the project stage.	Record Y1 actual at year end.	Record Y2 actual.	Record Y3 actual.	Set current RAG status.	Specify how progress will be verified.
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]
[Sub-category]	[Commitment]	[LNA ref]	[Output measure]	[Outcome for people]	[Quantified annual target]	[Named owner]	[Delivery partner or 'None confirmed']	[Pre-construction / Construction / Operations / All Stages]	[Y1 actual]	[Y2 actual]	[Y3 actual]	[G/A/R]	[Data source and verification method]

