



TOOLKIT SERIES

Social Value Project Charter

A structured template for setting, communicating and governing social value commitments, principles and key objectives on projects.

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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.

Contents

About this Charter	4
Before you begin	4
1. Purpose and project context	5
1.1 Purpose statement	5
1.2 Project overview	6
2. Vision and principles	8
2.1 Social value vision	8
2.2 Charter principles	9
3. Bridging ambition to action	11
4. Charter implementation - Governance and accountability	13
4.1 Roles and responsibilities	13
4.2 Social Value Working Group	15
5. Charter signatures	16

About this Charter

A Social Value Project Charter is the foundational document for social value delivery on a project. It establishes the shared commitment of all parties to a set of principles, objectives and governance arrangements before delivery begins.

Before you begin

Before completing this Charter, confirm the following are in place:

- Complete the Local Needs Analysis to identify the community needs this Charter will address.
- Review all social value requirements from the tender and project agreement and reflect them in the Charter commitments.
- Confirm that project leadership will endorse and sign the Charter.
- Identify all signatories, including the head contractor, key subcontractors and any community partner organisations.
- Set the first review date before completing

Note: The Charter is most useful when completed before construction begins and reviewed at each major project milestone.

Setting a review date at the time of signing can help ensure it remains a live document rather than a one-off submission.

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

1. Purpose and project context

This section establishes who the Charter is for, what it is responding to, and why social value matters for this specific project. Elements that are specific to this project and community tend to be more useful than statements that could apply to any project.

1.1 Purpose statement

How to write the Purpose statement

- State what the Charter commits to and why it matters for this project. Name the project.
- Name the affected communities or regions. Avoid generic terms like “local communities.”
- Include at least one specific community need, ideally drawn from the Local Needs Analysis.
- Identify the key groups the project aims to benefit or involve, such as First Nations communities, local jobseekers or local businesses.

Example: Purpose statement



Strong:

“This Charter commits [Project Name] and its partners to delivering lasting economic and social benefit for the communities of [LGA/region].

The project will operate in a region where youth unemployment stands at 24 percent, local businesses have historically been excluded from large infrastructure supply chains, and the economic benefits of the energy transition have not been equitably shared. This Charter establishes the principles and commitments that will govern how the project addresses those gaps.”

Weak:

“We are committed to delivering social value and working in partnership with local communities and First Nations peoples to deliver an equitable energy transition.” (This could apply to any project anywhere in Australia. It makes no specific commitment and references no identified need.)

Table 1. Purpose statement template

Purpose Statement

[Write the project’s Social Value Purpose Statement here. Two to four sentences. Specific to this project, this place and the needs identified in the Local Needs Analysis.]

1.2 Project overview

How to complete the project overview

Field	What to include
Project name	Use the official project name as it appears in the project agreement or development approval.
Head contractor	If not yet appointed at the time of signing, enter “To be confirmed” and update the Charter at the next review.
Project description	Two to three sentences covering what is being built, the infrastructure or technology type, and the approximate scale expressed in a relevant unit (e.g. MW, kilometres, number of structures, total capital value).
Project location	Name the local government area (LGA), the nearest town or community, and the approximate distance from the project site to that community. Do not enter a state or region name alone.
Defined local catchment area	The geographic boundary used to determine whether a worker or supplier qualifies as “local” for employment and procurement targets. Stating the definition clearly and specifically (e.g. “within 100 km of the project site boundary” or “within the boundaries of [LGA name] and adjoining LGAs”) and agreeing it with all signatories before signing is advisable. Changing the definition after signing would generally require a formal Charter amendment.
Project timeline	List major phases and their approximate start and end dates. Where dates are not yet confirmed, enter the estimated range. Update at each Charter review.
Key partners and signatories	List every organisation expected to sign the Charter. Having all listed organisations sign Section 5 before construction commences is generally advisable.
Social Value Lead	Enter the full name and position title of the suitably qualified responsible person for Charter delivery. A named person, rather than a team or function, tends to provide clearer accountability.
Charter version and review date	Setting the review date before signing is advisable. A review date no more than 12 months from the issue date, or at the start of the next major project phase (whichever comes first), is generally appropriate.

Table 2. Project overview template

Field	Detail
Project name	<i>[Enter project name]</i>
Proponent organisation	<i>[Enter organisation name]</i>
Head contractor	<i>[Enter if appointed]</i>
Project description	<i>[Brief description of project scope, technology and scale]</i>
Project location	<i>[Specify geographic area, LGA and nearest communities]</i>
Defined local catchment area	<i>[Distance or LGA definition for local employment and procurement targets]</i>
Project timeline	<i>[Key phases: planning, construction, commissioning, operations]</i>
Key partners and signatories	<i>[List organisations that will sign this Charter]</i>
Social Value Lead	<i>[Name and role of person responsible for Charter delivery]</i>
Charter version and review date	<i>[Version number and date of next scheduled review]</i>

Stop and check: Before proceeding



- ☐ Is the purpose statement specific to this project and this community, not a generic social value statement?
- ☐ Does the project overview reference the local catchment area that will be used to measure local employment and procurement commitments?
- ☐ Have all intended signatories been identified and agreed to sign?
- ☐ Is a Charter review date set and recorded in the project overview table?

This section feeds into: Section 2 (Vision and principles), which builds on the purpose statement to set the overarching direction for social value delivery.

2. Vision and principles



The vision and principles set the overarching direction for social value delivery. They should be written in a way that all project partners and community stakeholders can understand, remember and apply. Principles that are too abstract to guide a practical decision are not useful.

2.1 Social value vision

How to write the vision

- Write the vision at the Impact level of the Theory of Change, focusing on the long-term change the project contributes to, not construction activities.
- Describe the future from the host community's perspective in 10–15 years: what is materially different because the project was there?
- Make it specific to this place and community by naming relevant places, groups and issues.
- Keep it ambitious but credible: the Charter's commitments should clearly contribute to it. If they do not, the vision may be too broad or the commitments too narrow.
- Limit it to one to three sentences and use plain, and accessible language.
- Once drafted, setting it alongside the Impact column in the project's Theory of Change can be a useful check. Where the vision and Impact statements are not well aligned, revisiting one or both before continuing may be worthwhile.

Example: Vision statements



Strong:

"That the communities hosting this project have a stronger regional economy, a more skilled local workforce and a more resilient supply chain because of it, long after construction is complete."

Weak:

"To deliver an equitable and sustainable energy transition in partnership with First Nations and local communities."
(This is an industry-wide aspiration, not a project-specific vision.)

Table 3. Social value vision template

Social Value Vision

[Write the project's social value vision statement here. One to three sentences. Describes the long-term change the project's social value commitments are working towards.]

2.2 Charter principles

How to define Charter principles

- A principle is a statement of how the project will behave and make decisions. It is not an outcome, a target or an aspiration. “We will employ local people” is a commitment. “Local first” is a principle.
- Write each principle as a short, clear statement of three to six words, followed by a one to two sentence explanation of what it requires in practice on this specific project.
- Specific explanations tend to be more useful than general ones. “We will engage genuinely with communities” leaves the meaning open, whereas “Engagement with First Nations communities begins before any commitment design and requires co-design of the approach, not post-decision consultation” is clear about what the principle means in practice.

Example: Charter principles



- Principle 1: Evidence before action. Social value commitments are grounded in Local Needs Analysis findings, not assumed. We will not make commitments that are not connected to a demonstrated local need.
- Principle 2: Genuine partnership. Engagement with First Nations communities means co-designing initiatives with them, not consulting them after decisions are made.
- Principle 3: Measurable over aspirational. Commitments made in this Charter may be described in terms of an activity, an output, an outcome and a contribution to long-term impact. Where a commitment cannot be described in those terms, it may be worth revisiting whether it is sufficiently concrete.
- Principle 4: Local first. The project’s default position is to source workers, suppliers and services from within the defined local catchment before looking outside it.
- Principle 5: Transparency. Progress against commitments will be reported quarterly to the community, client and project board, whether or not targets are being met.

Table 4. Charter principles template

No	Principle	What this means in practice for this project
1	[Principle name]	[Specific description of what this principle requires on this project]
2	[Principle name]	[Specific description of what this principle requires on this project]
3	[Principle name]	[Specific description of what this principle requires on this project]
4	[Principle name]	[Specific description of what this principle requires on this project]
5	[Principle name]	[Specific description of what this principle requires on this project]
6	[Add if required]	



Stop and check: Before proceeding

- ☐ Is each principle written as a statement of behaviour rather than an outcome or aspiration?
- ☐ Does every principle have a specific explanation of what it means for this project?
- ☐ Can the principles be read and understood by a community member who is not a social value professional?
- ☐ Does the vision connect to the Impact level of the project's Theory of Change?

This section feeds into: Section 3 (Bridging Ambition to Action), which translates each principle into specific commitments, priority actions and Theory of Change connections.

3. Bridging ambition to action



This section translates the vision and principles established in Section 2 into specific commitments and priority actions. For each principle, the table below records what the project commits to doing, the concrete steps that will deliver it, how those steps connect to the Theory of Change, and who is responsible. Commitments that can be described in terms of activity, output and outcome tend to be more actionable than those that remain at the level of aspiration.

How to complete the bridging ambition to action table

- Each row should align to a principle in Section 2.2, so finalise the principles first and update the row if a principle changes.
- For each principle, include two to four specific, time-bound commitments. For example, “We will convene a local supplier briefing within 60 days of contract award” is stronger than “We will engage local businesses.”
- Use the Priority Actions column to list the practical steps needed to deliver each commitment, not to repeat the principle. Actions should be clear enough to implement without further instruction.
- In the Theory of Change column, identify the relevant level — Activity, Output, Outcome or Impact — and the specific change expected. Be realistic: not every commitment will link directly to Impact, and this will be harder to complete if no Theory of Change has been developed yet.
- Where possible, assign each commitment to a named responsible party from Section 4.1, as unnamed commitments are harder to track and deliver.



Example: Bridging ambition to action (Principle 1 — Meaningful First Nations partnerships)

- **Specific commitments:** Establish a First Nations Partnership Advisory Group within 90 days of contract award. Co-design a culturally appropriate engagement framework with the advisory group before any community-facing activity commences.
- **Priority actions:**
 - Engage the relevant land council and community organisations to identify advisory group members (month 1).
 - Facilitate a co-design workshop to develop the engagement framework (months 2–3).
 - Provide cultural awareness training to all site staff before mobilisation.
 - Establish a First Nations business register and circulate procurement opportunities.
- **Theory of Change connection:**
 - Activity - convene advisory group and co-design workshops.
 - Output - culturally appropriate engagement framework adopted by the project.
 - Outcome - First Nations communities have genuine influence over project decisions affecting them. The advisory group is nominated by community, not appointed by the project.
- **Responsible party:** Social Value Lead (coordination); Community Liaison Officer (day-to-day engagement).

Table 5. Bridging ambition to action template

No	Principle (from Section 2.2)	Specific commitments and priority actions	Theory of Change connection (Activity → Output → Outcome)	Responsible party
1	[Principle name from Section 2.2]	[List specific, time-bound commitments. Then list the priority actions needed to deliver them, specific enough to act on without further instruction.]	[Activity - what will be done. Output - what will be produced or delivered. Outcome - the change that will result. Identify the level this commitment primarily addresses and describe the expected change at that level.]	[Role from Section 4.1]
2	Principle	Commitments and priority actions	What will be done	Key persons



Stop and check: Before proceeding

- ☐ Does every row correspond to a principle that has been finalised in Section 2.2?
- ☐ Is every commitment specific and time-bound, not a restatement of the principle?
- ☐ Can every priority action be acted on by a project team member without further instruction?
- ☐ Does the Theory of Change column identify the correct level (Activity, Output, Outcome or Impact) and describe the expected change at that level?
- ☐ Does every commitment have a named responsible party drawn from Section 4.1?

This section feeds into: Section 4 (Charter Implementation – Governance and Accountability), where the roles responsible for delivering these commitments are formally assigned and the oversight structure to track delivery is established.



4. Charter implementation - Governance and accountability

A Charter without a governance structure is a statement of intent. This section establishes who is responsible for what, how decisions are made, and what happens when commitments are not being met.

4.1 Roles and responsibilities

How to complete the roles and responsibilities table

- Include every role with formal responsibility for delivering Charter commitments.
- Use position titles in the Role column and list the named person separately.
- Name the Social Value Lead as an individual, not a team or function.
- Include subcontractors whose workforce or procurement decisions affect delivery.
- Make Key Responsibilities specific and actionable.
- List an Escalation Contact for every role except the most senior project leader.

Table 6. Roles and responsibilities template

Role	Organisation	Named person	Key responsibilities	Escalation contact
Social Value Lead	<i>[Organisation]</i>	<i>[Name]</i>	<i>Maintaining Charter; coordinating delivery across themes; preparing quarterly reports; managing community relationships</i>	[Senior project leader name and role]
Project Director / Project Manager	<i>[Organisation]</i>	<i>[Name]</i>	<i>Endorsing Charter commitments; providing resources; receiving escalations from Social Value Lead; signing Charter</i>	N/A
Community Liaison Officer	<i>[Organisation]</i>	<i>[Name]</i>	<i>Day-to-day community engagement; managing community reference group; supporting First Nations partnership activities</i>	Social Value Lead
Commercial Manager	<i>[Organisation]</i>	<i>[Name]</i>	<i>Implementing local procurement policy; providing procurement data to Social Value Lead; briefing subcontractors on procurement commitments</i>	Social Value Lead
HR / Workforce Manager	<i>[Organisation]</i>	<i>[Name]</i>	<i>Implementing local employment commitments; collecting and providing payroll data by postcode; managing pre-employment program referrals</i>	Social Value Lead
[Key subcontractor]	<i>[Organisation]</i>	<i>[Name]</i>	<i>[Responsibilities]</i>	Social Value Lead
[Community partner organisation]	<i>[Organisation]</i>	<i>[Name]</i>	<i>[Responsibilities]</i>	Social Value Lead

4.2 Social Value Working Group

How to structure the social value working group

Aspect	Requirements
Meeting frequency	Monthly during construction and quarterly during operations. Reducing frequency during construction is generally inadvisable without a formal Charter amendment agreed by all signatories.
Chair	The Social Value Lead is the default Chair. The Chair is responsible for setting the agenda, circulating minutes, and tracking actions between meetings.
Membership	At a minimum, include the Social Value Lead, Community Liaison Officer, HR or Workforce Manager, Commercial Manager, and at least one representative from each major subcontractor with workforce or procurement responsibilities.
Community representation	At least one community representative is advisable as a member. This person would generally not be employed by the project. Where possible, the representative may be nominated by a community reference group rather than appointed by the project.
First Nations representation	Where the project operates in or near a community with a significant First Nations population, including a First Nations representative as a separate member (distinct from the general community representative) is generally advisable. This individual may be nominated by the relevant community or land council rather than selected by the project.
Quorum	Define the minimum number of members required to make formal decisions. A quorum of at least 50% of members is recommended, including the Social Value Lead and at least one community representative.
Minutes	Minutes may be circulated to all Working Group members within 10 business days of each meeting. A summary provided to all Charter signatories within the same timeframe can support transparency.
Action log	Maintaining a running action log between meetings can help with continuity. Each action may include a named responsible person and a due date.

Table 7. Social value working group template

Working Group element	Detail
Meeting frequency	<i>[Monthly during construction; quarterly during operations]</i>
Chair	<i>[Name and role]</i>
Members	<i>[List all Working Group members and their organisations]</i>
Community representation	<i>[Name or process for identifying community representative]</i>
First Nations representation	<i>[Name or process for identifying First Nations representative]</i>
Quorum	<i>[Minimum number of members required for decisions to be made]</i>
Escalation process	<i>[What happens if a commitment is assessed as at risk at a Working Group meeting]</i>

5. Charter signatures

Note: This Charter is a live document. The next scheduled review date is recorded in Section 1.2. When the Charter is updated following a review, having all signatories re-sign the updated version is advisable. Retaining a signed copy of each version supports a clear record of changes over time.

Signatory 1

Full name	
Position	
Organisation	
Date	
Signature	

Signatory 2

Full name	
Position	
Organisation	
Date	
Signature	

Signatory 3

Full name	
Position	
Organisation	
Date	
Signature	

Charter version control

Version: [Enter version number]

Issued: [Enter date]

Next review: [Enter date]

