



TOOLKIT SERIES

Project Social Value Framework Guidance

A introductory guide to developing a project social value framework

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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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How this guide fits into the social value process

This introductory guide helps project teams develop an overarching project social value framework, a strategic document that defines what the project stands for, which themes it will prioritise, and what it is ultimately seeking to achieve for the community. It is not intended to be exhaustive; rather, it provides a practical foundation for projects to build on.

It sits at the top of the social value process:

1. Social Value Framework ← This guide

Defines the project's social value themes, purpose, outcomes, and objectives. Establishes the community need and the project's overarching commitment.

2. Theory of Change

Maps how the project's activities will lead to the outcomes defined in this framework.

3. Social Value Action Plan

Translates the framework into specific actions, targets, responsibilities, and a reporting schedule.

Targets, actions, and performance tracking are not part of this document. They are developed in the Theory of Change and Social Value Action Plan, which draw directly from the framework produced here.

Before you start

The five items below are worth having in place before beginning Step 1.

Stop and check



- ☐ Your Local Needs Analysis (LNA) is complete. Have the findings document open alongside this guide.
- ☐ You have identified the three to five most significant LNA findings for this community - unemployment rate, First Nations population, priority groups, local business capacity, key stakeholder priorities.
- ☐ You have reviewed the contract or tender documents and noted every specific social value requirement.
- ☐ You have consulted the Project Manager, Procurement Manager, HR/Workforce Lead and any other relevant teams before selecting themes or defining objectives.
- ☐ The Executive Sponsor is identified and aware they will be asked to approve this framework.

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

Step 1 – Project context and commitment

Record the essential facts about the project, your contractual social value obligations, and your overarching commitment to the community.

Table 1. Project context

Field	Your response – complete all rows
Project name. <i>Official name as used in the contract.</i>	<i>[Project name]</i>
Project location. <i>Specific town, suburb or region and Local Government Area.</i>	<i>[Town/Region, LGA, State]</i>
Project scale and duration. <i>Approximate contract value and timeframe.</i>	<i>Approximately \$[value]; [X]-month program from [Month Year] to [Month Year]</i>
Client	<i>[Client organisation name]</i>
Head contractor	<i>[Head contractor name]</i>
Contractual social value requirements. <i>List each obligation as stated in the contract or tender, rather than paraphrasing.</i>	<i>[List each requirement verbatim]</i>
Communities affected. <i>Name the LGA(s). Two to three sentences on socio-economic context from the LNA.</i>	<i>[LGA name(s)]. The LNA identified [e.g. unemployment X% above state average; X% First Nations population; SEIFA decile X]</i>
Overarching commitment. <i>In 2–3 sentences name the community, the people, and what the project will do. No generic language.</i>	<i>[Your project's commitment - name who you will prioritise and what you will do]</i>
Executive sponsor <i>Named individual.</i>	<i>[Full name], [Title]</i>
Social value lead <i>Named individual.</i>	<i>[Full name], [Title]</i>
Framework approved	<i>[DD/MM/YYYY]</i>
Next review date	<i>[DD/MM/YYYY]</i>



Stop and check

- ☐ All rows completed where relevant.
- ☐ Contractual requirements recorded accurately.
- ☐ Communities identified by LGA name with LNA context.
- ☐ Overarching commitment names specific people and specific intentions.
- ☐ Executive Sponsor briefed and named.

→ **Proceed to Step 2.**

Step 2 – Identify your social value themes



Themes may be drawn from LNA findings rather than copied from another project or a standard list.

A theme represents a priority area where this project has a genuine opportunity to create social value, based on what the community needs.

How to identify your themes

- 1. LNA Section 2 - Community Baseline:** Is the SEIFA decile low? Is unemployment elevated, particularly for young people or First Nations peoples? High disadvantage supports employment and training themes.
- 2. LNA Section 3, Step 1 - Stakeholder Priorities:** What did local people, councils, employment services, and First Nations organisations say they needed? Recurring priorities become themes.
- 3. LNA Section 3, Step 2 and Appendix B - Local Supply Chain:** Are there Supply Nation-registered businesses or local businesses ready to supply but not accessing project work? This supports a procurement theme.
- 4. Contract requirements:** Any mandated social value area would typically be reflected as a theme. The LNA may help determine how far commitments can go beyond the minimum.

A theme is most useful where there is genuine community need and an opportunity for the project to make a difference.

Table 2. Social value themes

Field	Complete based on LNA findings - not a standard list
Theme 1 Name the theme.	<i>[e.g. Local Employment / First Nations Employment and Business / Apprenticeships and Training / Local Procurement / Community Investment]</i>
LNA evidence Which specific finding makes this a priority for this community?	<i>[LNA section and finding - e.g. 'LNA Section 2: youth unemployment at X%, significantly above state average']</i>
Contractual requirement (if applicable)	<i>[Yes/No - if yes, note the specific requirement]</i>
Theme 2	<i>[Theme name]</i>
LNA evidence	<i>[LNA section and finding]</i>
Contractual requirement (if applicable)	<i>[Yes/No]</i>
Theme 3	<i>[Theme name]</i>
LNA evidence	<i>[LNA section and finding]</i>
Contractual requirement (if applicable)	<i>[Yes/No]</i>
Theme 4 (if applicable)	<i>[Theme name]</i>
LNA evidence	<i>[LNA section and finding]</i>
Contractual requirement (if applicable)	<i>[Yes/No]</i>
Theme 5 (if applicable)	<i>[Theme name]</i>
LNA evidence	<i>[LNA section and finding]</i>
Contractual requirement (if applicable)	<i>[Yes/No]</i>

Stop and check

- ☐ Key themes selected.
- ☐ Each theme is linked to a specific LNA finding.
- ☐ All contractually required themes are included.
- ☐ Project Manager, Procurement Manager and other key team members have reviewed and agreed the themes.

→ **Proceed to Step 3.**



Step 3 – Purpose, outcomes and objectives



For each theme identified in Step 2, define its purpose, the outcomes expected for the community, and the project's objectives within that theme.

This step produces the strategic content of the framework. Specific targets and actions are developed in the Theory of Change and Social Value Action Plan.

- **Purpose** - Why this theme matters for this specific community. The need it addresses.
- **Outcomes** - The changes expected for people and community as a result of the project's work within this theme. Outcomes describe the difference you want to make, not the number you are aiming for.
- **Objectives** - The project's directional commitments within this theme - what it will work toward. Objectives are not quantified here; specific targets are set in the Social Value Action Plan.

Table 3. Example - Theme: Local employment (for illustration only)

Theme	Local employment
LNA evidence	<i>LNA Section 2 identifies unemployment in [LGA] at X%, significantly above the state average. Long-term unemployment is concentrated among young people aged 18–24 and First Nations community members.</i>
Purpose	<i>To ensure that local people - particularly those facing the greatest barriers to employment - have a genuine pathway into project jobs, and that the project's workforce investment stays in the community.</i>
Outcomes	• <i>Local people, including those who have been out of work for an extended period, gain employment through the project.</i> • <i>Young people and First Nations community members are represented in the project workforce at rates that reflect local population.</i> • <i>Workers gain skills and experience that support ongoing employment beyond the project.</i>
Objectives	• <i>Prioritise recruitment from within the project Local Government Area.</i> • <i>Partner with local employment services to build a pipeline of job-ready candidates before workforce ramp-up.</i> • <i>Implement targeted recruitment pathways for priority groups identified in the LNA.</i> • <i>Include local employment requirements in all Tier 1 subcontracts.</i>
Links to	<i>Theory of Change - Local Employment pathway Social Value Action Plan - Workforce actions and targets</i>

Table 4. Purpose, outcomes and objectives

Field	Complete one block per theme from Table 2
Theme 1 Copy from Table 2.	<i>[Theme name]</i>
LNA evidence The specific finding that makes this a priority.	<i>[LNA section and finding]</i>
Purpose Why this theme matters for this specific community. The need it addresses.	<i>[Purpose statement]</i>
Outcomes The changes expected for people and community. Use bullet points.	<i>[• Outcome 1 • Outcome 2 • Outcome 3]</i>
Objectives The project's directional commitments. Not quantified here - targets sit in the Action Plan.	<i>[• Objective 1 • Objective 2 • Objective 3]</i>
Links to Reference to the relevant Theory of Change pathway and Action Plan section.	<i>[Theory of Change - [pathway] Social Value Action Plan - [section]]</i>
Theme 2 Copy from Template 2.	<i>[Theme name]</i>
LNA evidence The specific finding that makes this a priority.	<i>[LNA section and finding]</i>
Purpose Why this theme matters for this specific community. The need it addresses.	<i>[Purpose statement]</i>
Outcomes The changes expected for people and community. Use bullet points.	<i>[• Outcome 1 • Outcome 2 • Outcome 3]</i>
Objectives The project's directional commitments. Not quantified here - targets sit in the Action Plan.	<i>[• Objective 1 • Objective 2 • Objective 3]</i>
Links to Reference to the relevant Theory of Change pathway and Action Plan section.	<i>[Theory of Change - [pathway] Social Value Action Plan - [section]]</i>
Theme 3 Copy from Template 2.	<i>[Theme name]</i>
LNA evidence The specific finding that makes this a priority.	<i>[LNA section and finding]</i>
Purpose Why this theme matters for this specific community. The need it addresses.	<i>[Purpose statement]</i>
Outcomes The changes expected for people and community. Use bullet points.	<i>[• Outcome 1 • Outcome 2 • Outcome 3]</i>
Objectives The project's directional commitments. Not quantified here - targets sit in the Action Plan.	<i>[• Objective 1 • Objective 2 • Objective 3]</i>
Links to Reference to the relevant Theory of Change pathway and Action Plan section.	<i>[Theory of Change - [pathway] Social Value Action Plan - [section]]</i>

Field	Complete one block per theme from Table 2
Theme 4 (if applicable)	<i>[Theme name]</i>
LNA evidence The specific finding that makes this a priority.	<i>[LNA section and finding]</i>
Purpose Why this theme matters for this specific community. The need it addresses.	<i>[Purpose statement]</i>
Outcomes The changes expected for people and community. Use bullet points.	<i>[• Outcome 1 • Outcome 2 • Outcome 3]</i>
Objectives The project's directional commitments. Not quantified here - targets sit in the Action Plan.	<i>[• Objective 1 • Objective 2 • Objective 3]</i>
Links to Reference to the relevant Theory of Change pathway and Action Plan section.	<i>[Theory of Change - [pathway] Social Value Action Plan - [section]]</i>
Theme 5 (if applicable)	<i>[Theme name]</i>
LNA evidence The specific finding that makes this a priority.	<i>[LNA section and finding]</i>
Purpose Why this theme matters for this specific community. The need it addresses.	<i>[Purpose statement]</i>
Outcomes The changes expected for people and community. Use bullet points.	<i>[• Outcome 1 • Outcome 2 • Outcome 3]</i>
Objectives The project's directional commitments. Not quantified here - targets sit in the Action Plan.	<i>[• Objective 1 • Objective 2 • Objective 3]</i>
Links to Reference to the relevant Theory of Change pathway and Action Plan section.	<i>[Theory of Change - [pathway] Social Value Action Plan - [section]]</i>

Stop and check

- ☐ Every theme from Step 2 has a completed purpose, outcomes, and objectives block.
- ☐ Purpose statements describe a specific community need - not a generic aspiration.
- ☐ Outcomes describe change for people, not project activities.
- ☐ Objectives are directional but not yet quantified - targets will be set in the Action Plan.
- ☐ Each theme is linked to the relevant Theory of Change and Action Plan section.

→ **Proceed to Step 4.**





Step 4 – Governance

This section names the people accountable for the framework and sets a review schedule. Detailed delivery governance - actions, targets, escalation, and reporting - is managed through the Social Value Action Plan.

Table 5. Example governance roles and responsibilities

Role	Responsibility
Executive Sponsor	Approves the framework. Receives framework review reports. Accountable at the highest level for the project's social value commitments.
Project Manager	Ensures social value is integrated into project delivery decisions. Accountable for resourcing social value commitments.
Social Value Lead	Owens this framework document. Leads development of the Theory of Change and Action Plan. Manages day-to-day delivery and reporting against the themes and objectives set here.
Procurement Manager	Integrates relevant framework themes and objectives into subcontracts and procurement decisions.
HR / Workforce Lead	Integrates relevant framework themes and objectives into workforce planning and recruitment.

Review schedule

This framework should be reviewed at a minimum every six months and at any major project milestone. Reviews check that the themes and objectives remain appropriate given project progress and any changes in community context.

Each review is led by the Social Value Lead and attended by the Project Manager. The Executive Sponsor is briefed on any material changes before they are approved.

Table 6. Governance templates

Field	Name specific people for all rows
Executive sponsor	[Full name], [Title]
Project manager	[Full name], [Title]
Social value lead	[Full name], [Title]
Procurement manager	[Full name], [Title]
HR / workforce lead	[Full name], [Title]
Framework approved by	[Full name], [Title] - [DD/MM/YYYY]
6-month review date	[DD/MM/YYYY]
12-month review date	[DD/MM/YYYY]
Project close-out review	[DD/MM/YYYY or 'final 4 weeks of project']
Related documents	Theory of Change - [document name/version] Social Value Action Plan - [document name/version]

Stop and check

- ☐ All roles named with specific people.
- ☐ Review dates entered in the project calendar.
- ☐ Links to the Theory of Change and Social Value Action Plan documented.
- ☐ Executive Sponsor has reviewed and signed off the completed framework.

→ **Framework complete. The Project Social Value Snapshot below may be completed and shared with relevant parties.**



Project Social Value Snapshot

This one-page summary may be completed once the framework is approved and shared with key stakeholders, subcontractors, and local community as relevant.

Updating it at each six-monthly review can help keep it current as project and community needs change.

Table 7. Project social value snapshot template

Project name	[Project name]
Location and duration	<i>[Region, State] [Year]–[Year]</i>
Our commitment to this community 2–3 sentences from Table 1.	<i>[Your overarching commitment]</i>
Theme 1 and purpose	<i>[Theme name]</i> <i>[One-sentence purpose statement]</i>
Theme 2 and purpose	<i>[Theme name]</i> <i>[One-sentence purpose statement]</i>
Theme 3 and purpose	<i>[Theme name]</i> <i>[One-sentence purpose statement]</i>
Theme 4 and purpose (if applicable)	<i>[Theme name]</i> <i>[One-sentence purpose statement]</i>
Theme 5 and purpose (if applicable)	<i>[Theme name]</i> <i>[One-sentence purpose statement]</i>
Key outcomes we are working toward Brief summary across all themes.	<i>[2–3 sentences describing the overall change this project aims to create for the community]</i>
Related documents	<i>Theory of Change - [reference] Social Value Action Plan - [reference]</i>
Executive sponsor	<i>[Full name], [Title]</i>
Social value lead - contact	<i>[Name], [email], [phone]</i>
Framework approved	<i>[DD/MM/YYYY]</i>
Last updated	<i>[DD/MM/YYYY]</i>

