

MAYOR OF LONDON

**PROCURING
SOCIAL VALUE
& EDI**

PROCESS NOTE

GOOD GROWTH BY DESIGN



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**AUTHORED BY THE GLA
REGENERATION TEAM**

INTRODUCTION

The creation of diverse and accessible local places and economies are key priorities for the Mayor, and the GLA is committed to working with public and private sector clients to champion sustainable and inclusive growth in London. The built environment can exclude groups and exacerbate inequalities if it is not designed and managed in an inclusive way. This means how we design and who is involved is vital in creating a more equal, safe city for Londoners to live. To achieve a more inclusive built environment requires a more diverse built environment workforce and better practices of inclusive design – both important steps towards the Mayor’s vision for a safer, fairer, greener and more prosperous city for all Londoners.

Building on learnings from implementing the equality, diversity and inclusion (EDI) and social value requirements of the Mayor’s Architecture Design and Urbanism Panel (ADUP), and the subsequent procurement of the new Architecture + Urbanism Framework, this process note is intended to help commissioning authorities maximise social value and EDI benefits in their procurement of design services.

It aims to guide any client involved in commissioning to develop a consistent approach to setting expectations and assessment methods. A proactive and vigorous approach to social value and EDI in built environment projects has been shown to deliver immediate, tangible benefits – including more efficient consensus building, faster planning applications, improved design quality, greater user satisfaction and successful, integrated communities. This process note demonstrates how to embed social value and EDI as qualitative principles in project commissioning, setting a minimum benchmark for clients to promote them as integral elements in excellent procurement processes.

Social value and EDI are presented here as distinct but inherently linked principles which are primarily concerned with the skills and expertise required to appropriately respond to the local context of a project; with social value integrated into design approach and methodology, and EDI associated with project team skills and resourcing considerations. The principles and case study projects presented here demonstrate that a full

and accurate understanding of the community a project will serve - including that of the wider demographic and local context - underpins successful bids that deliver social value and EDI benefits.

It should be acknowledged that embedding qualitative social value and EDI requirements into design procurement processes has financial and resourcing implications for both commissioning authorities and bidding teams, and this should be addressed transparently in project briefs and budgets. We therefore encourage commissioning teams to allow for this within their assessment processes and urge suppliers to allocate appropriately within their resourcing plans. This is particularly important from the perspective of proportionality and the scale of projects, ensuring the balance is appropriate to the project at hand, whether it be a complex regeneration project or a small-scale intervention.

PRINCIPLES

1. Consider decisions about scope of your project brief prior to establishing a procurement strategy. Understand how these decisions will inform your choice of procurement route.

Key questions that can impact a commissioning authority's capacity to meet social value and EDI aspirations include:

- What is the available budget for design fees? The value of a procurement process can often dictate the number of available routes that can be taken, but this should not compromise social value and EDI outcomes. For lower value procurement, consider an invited shortlist of minority-led design practices (defined in the Mayor's ADUP framework as having 50% or more of its leadership who identify with being female, Black, Asian, Minority Ethnic, disabled or as members of the LGBTQIA+ community), or take a Reserved Procurement approach. For higher value procurement consider using a framework that promotes social value and EDI such as the Mayor's Architecture + Urbanism Framework or a design competition that can also be used to leverage better public engagement longer term.
- Is the scale of the scheme appropriate to enable micro and SMEs to bid for the project? If not, is there scope to de-couple elements of the brief to unlock opportunities for smaller practices? Or, could you require more established practices to join up with and/ or incubate emerging diverse micro-enterprises as part of their team?
- What contract route is going to lead to the best EDI and social value outcomes for the project? Contracts that enable design team retention can help develop knowledge of place and communities, support co-design processes, build relationships and craft meaningful proposals that involve users and local communities over its lifetime.

2. Set project objectives and outcomes by identifying the social, environmental, and economic impacts you want a project to have for the people who will ultimately be using it, and then link these to the process of project commissioning.

The objectives you set will vary depending on your organisation and project, and several actions/ tasks may be required to deliver them.

Where applicable you should outline how you propose to remove or minimise disadvantages suffered by people due to their protected characteristics, take steps to meet the needs of people from protected groups where these are different from the needs of other people, and encourage people from protected groups to participate in and benefit from your project.

3. Embed project objectives and outcomes into the design brief. Promote a contextual place-based approach that requires local knowledge to form part of the design methodology.

For example, these requirements may include:

- Working with and listening to feedback from a diverse set of people as part of the project development to ensure different lived experiences are incorporated.
- Ensuring the adoption of Inclusive Design principles to prioritise accessibility.
- Supporting the local economy by looking for ways to work with companies (and their supply chains) that have a good track record and can clearly demonstrate that they promote EDI.
- Providing training and apprenticeship opportunities across the design, development, delivery, and legacy stages of a project to maximise social value outcomes for the lifetime of a project.
- Targeting recruitment for under-represented groups within the local community.
- Designing solutions that support better environmental outcomes

for local people and support circular economy principles.

- Advocating for collaboration between lead designers and emerging local practices as well as those led by practitioners from under-represented groups to widen representation within the project team.

4. Develop a clear assessment methodology and set your technical assessment weightings to promote design quality, social value and EDI.

The role of design procurement continues to be one of the public sector's best commissioning levers to deliver high quality outcomes and added value when delivering built environment projects. A procurement approach that prioritises technical quality is regularly found to deliver longer term value for money for clients, including lower costs and efficiency of use over the lifetime of a project, as well as better outcomes for the people who will use it. This is important when considering the actual cost of design fees vs the lifetime costs of a project.

For example, the [Mayor's Architecture + Urbanism Framework](#) utilises an assessment weighting of:

- Design Quality – 55% (inc. 10% social value)
- Skills and Expertise – 25% (inc. 5% EDI)
- Financial – 20%

The assessment criteria should respond to your design brief and be included within your specification document.

5. Introduce a qualitative assessment element for social value as part of the technical assessment criteria for design quality.

This should be linked to the design methodology required for the 'Design Quality' section of your assessment criteria and require bidders to demonstrate how they will embed social value into their project approach. Considerations for bidding practices could include their approach to:

- Local engagement, participation, and co-design
- designing for the various needs of the project users, existing local communities, and future community needs, with specific regard to promoting physical, social, and economic accessibility
- collaborating with groups (with protected characteristics) within the existing community who are historically under-represented in the authorship of the shared, local built environment
- ensuring communities can engage with and benefit from proposed development in the design, delivery, and operational phases
- utilising local supply chains and contributing to the local economy.

An example social value assessment criteria can be found in the resources section of this process note.

6. Introduce a qualitative assessment for EDI as part of the technical assessment criteria.

This should be linked to the 'Skills and Expertise' part of your assessment criteria and require bidders to explain their approach to assembling an appropriately diverse project team in relation to the project context and to support delivery of the social value led design methodology they outlined in the 'Design Quality' section. By including EDI considerations in their project resourcing and description of their expertise, bidders are better able to demonstrate how they can respond effectively to the different lived experiences and diverse voices within the local socioeconomic context of the proposed project.

Considerations for bidding practices could include:

- The diversity of the bidding organisation/ design team
- the types of local organisations and experts that would be needed to deliver the social value led design methodology
- their approach to working with practices and organisations led by under-represented practitioners/ specialists/ suppliers – whether through collaboration, incubation or sub-contracting as part of the project team, beyond the scope of community engagement
- their approach to sharing cultural capital with under-represented groups through processes such as mentoring, outreach and training opportunities.

An example EDI assessment criteria can be found in the resources section of this process note.

7. Include clear guidance in briefing documents to set expectations for the quantity of information you are requesting within the ITT return.

For small to medium sized built environment projects a general rule is to allow for a maximum of two A4 pages for the social value approach, and one A4 page for the EDI approach, however this should be amended to suit the scale of the project. For example, where the commission is for a large scale multi-million-pound development, the submission requirements should allow for more pages.

8. Assemble a diverse evaluation panel to score the bids and ensure they are fully briefed.

Evaluation panels should be diverse and representative of the London context, ensuring a balance in gender and ethnicities across the group. Commissioning teams should ensure evaluators are fully briefed on the

project objectives, outcomes, brief and assessment criteria before evaluation begins. The GLA also recommend that all evaluators receive appropriately tailored 'Unconscious Bias Training' to help mitigate the impact of bias on the procurement process.

9. Evaluate and score bids according to the assessment criteria in the brief and specification documents.

Social value and EDI submissions should be scored by the technical evaluators, in parallel with the other 'Design Quality' and 'Skills and Expertise' elements of a bid. By reviewing submissions against the proposals for project resourcing and programme you are better able to ensure that a coordinated approach has been taken. The GLA also recommend assessing the financial submission in conjunction with the proposed resourcing plan and programme to ensure value for money is being delivered.

When assessing a bidder's previous experience, you could allow for evaluators to take an open view on relevant work that acknowledges and promotes transferable skills. This could unlock opportunities for practices with strong skills related EDI and social value, as well as develop a broader cohort of competent practices over time.

10. Provide clear and meaningful feedback to all bidding practices following ITT evaluation.

Providing feedback for bidders is an important part of the commissioning process, particularly for less established practices who will be able to use it to review their approach and improve. As social value and EDI technical components are a relatively new part of design procurement processes, it is also important to provide specific feedback on these elements of the bid.

PRACTICE

Case Study 001 - Nourish Hub

Key facts:

- Who: LB Hammersmith and Fulham
- Funding: £1.1 million, GLA Good Growth Fund; £1.78 million LB Hammersmith and Fulham.
- Partners: Groundwork, UK Harvest, Inner Circle
- Project: In 2018 LB Hammersmith and Fulham commissioned a design team to create a new community food hub and affordable workspace in the Edward Woods estates, and improve the public realm linking the two estates. The new 'Nourish Hub' project has cooked up to 200 healthy meals each day for local people, works to combat social isolation through activities, and provides education programmes and training to support employment.

Actions:

1. Providing accessible employment and training opportunities.

The provision of employment and training opportunities to build a more cohesive and sustainable community were key principles in developing the Nourish Hub. These aims were embedded across the ITT Brief and assessment criteria in the following ways;

- Functional requirements were set out in the brief to accommodate training and commercial kitchens, and a flexible meeting/ workspace hub to meet the needs of SMEs, entrepreneurs and artists. These were not spatial requirements in order to generate more creative responses from tenderers.
- Detailed objectives were embedded in the brief so bidders could provide social value outcomes that linked to the activities/goals of the programme.
- Engagement and co-design requirements included fully involving the future operator and key stakeholders in the detailed design.
- The award criteria set out specific elements within a 70% weighting for quality, including approach to co-design and engagement, and relevant experience of projects of similar scale and type.

2. Engaging the community and supporting the most vulnerable.

The brief included approaches that sought to secure improved food access and future self sufficiency for the most vulnerable members of the community. This was embedded in the following ways;

- Spatial requirements were planned to provide suitable spaces for vulnerable trainees and their carers, and a welcoming environment that supports social inclusion more broadly.
- Specific community engagement requirements in the brief included a minimum number of consultation sessions and a summary of key aims, activities and outputs around these events. These included one event to create awareness, a second event to understand local capacity and need, and a series of youth workshops.
- Social value criteria were specified in the 70% quality assessment, including approach to disseminating information in an engaging manner through events, participatory processes or conferences.

Outcomes:

1. The practice selected through the tender process focused on including local people and future users, and proposed an events-based programme which captured the link between engagement and design and how to connect it back to the theme of food. It was a collaborative process between the lead practice, and the key stakeholders.

2. Each part of the engagement process had a tangible output manifested in the final space – this included the design for tiles, a ceiling mural, glazing, and other design features such as colour and furnishings. Focused sessions ran alongside larger events, for example a special photography session with children to shape the ceiling mural, and planting clinics with residents onsite. The priority was to keep people engaged while informing the design process.

3. The Nourish Hub reaches a large cross section of the community and has created a substantial range of jobs, volunteering opportunities, training workshops and classes, and a children's summer programme. The Hub has an established weekly 'donate as you dine' meal scheme

which funds their community projects, and it caters to vulnerable users through food tokens and free hot meals. Five empty units have been brought back into use, 9,478sqm of improvements to the landscape, and 25 areas where Sustainable Urban Drainage has been introduced.



IMAGE CREDIT FRANCISCO IBANEZ HANTKE



IMAGE FROM REPORT BY GORT SCOTT, CARVER HAGGARD, UNCOMMON GROUND,
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Case Study 002 - Camberwell Area Study

Key facts:

- Who: Southwark Council
- Funding: £100,000
- Partners: GLA & Southwark Council
- Project: The GLA/TfL ADUP framework was used to procure design services for the Camberwell Area Study. Phase one consisted of a scoping study, while Phase two focussed on the development of a plan for short term capital improvements – including public realm interventions and new uses for vacant units that would enhance the local economy.

Actions:

1. Supporting the local economy

Southwark Council's 'Fairer Future' commitments aim to support the local economy, this shaped the brief and how bids were assessed in the following ways:

- Tenderers were encouraged to work in partnership with one or more local SMEs with relevant expertise and experience.
- The award criteria set out specific elements within a 70% weighting for quality which included social value, with 10% allocated to suppliers' approach to working with local SMEs.

2. Engaging communities within the design process

A key project objective was to allow a broad range of stakeholders, including the most disadvantaged groups, to democratically influence the vision for the area. This was embedded within the brief and scope of work in the following ways;

- Outreach and engagement requirements including working with named residents' groups, and community and voluntary sector organisations.
- Specific engagement methodologies including arts projects, were required, in order to enable all ages, abilities and cultures to get involved.

- A requirement to develop a placemaking concept design in collaboration with local communities and creative organisations.
- A further requirement for a consultation plan devised and implemented to proactively engage with local stakeholders including SMEs, Black Asian and Minority Ethnic communities, creative organisations and landowners.

Outcomes:

1. The lead architect was appointed alongside a locally based practice. This team worked collaboratively, each focusing on their strengths. The lead architect produced a detailed place study and the local architect compiled nine locations for potential intervention. This work led to three of these areas being developed in more detail – with one being taken forward for delivery in a follow-on commission by a local practice.

2. A significant outreach programme reached and engaged with a broad range of different sections of the community. The council were able to leverage existing relationships to reach underrepresented groups and host local events and meetings - in particular engaging with the black youth community and older residents. This work has laid the ground for a subsequent public realm commission for a local, minority-led practice.

RESOURCES

Social Value Assessment Criteria Example

The following criteria has been developed to assist commissioning authorities with assessing the social value elements of design procurement submissions. This can be tailored accordingly to your project requirements.

Score	Rationale
Excellent	The proposal demonstrates an excellent understanding of how to approach securing social value as part of a design methodology and identifies a broad range of high-quality examples and processes with a clear understanding of their positive impacts on end users and project outcomes. An in-depth and innovative approach to local and diverse engagement processes have been effectively incorporated in the proposed methodology, including specific examples for hard-to-reach groups.
Good	The proposal demonstrates a good understanding of how to approach securing social value as part of a design methodology and identifies specific high-quality examples and processes with a clear understanding of their positive impacts on end users and project outcomes. Best practice local and diverse engagement processes have been effectively incorporated in the proposed methodology.

Satisfactory	The proposal demonstrates a satisfactory understanding of how to approach securing social value as part of a design methodology. Standard industry approaches to engagement and consultation are identified with a limited understanding of their impact on end users or project outcomes. The approach is limited in terms of its overall approach.
Poor	The proposal demonstrates a poor understanding of how to approach securing social value as part of a design methodology. The incorporation of standard industry approaches to engagement and consultation are limited with no understanding of their impact on end users or project outcomes. The approach is under-developed.
Unacceptable	An appropriate understanding of the requirements has not been met. The approach fails to incorporate social value into the design methodology and would not meet the social value expectations of bidders within the framework.

EDI Assessment Criteria Example

The following criteria has been developed to assist commissioning authorities with assessing the EDI elements of design procurement submissions. This can be tailored accordingly to your project requirements.

Score	Rationale
Excellent	The submission demonstrates an excellent understanding of the approach needed assemble a diverse project team that is capable of effectively responding to the different lived experiences of the proposal's end users. The approach is innovative, multifaceted, and clearly links to both the design methodology and overall design response, with the potential to create high quality inclusive project outcomes.
Good	The submission demonstrates a good understanding of the approach needed assemble a diverse project team that is capable of effectively responding to the different lived experiences of the proposal's end users. The approach is multifaceted, and links to both the design methodology and overall design response, with the potential to create high quality inclusive project outcomes.

Satisfactory	The submission demonstrates a satisfactory understanding of the approach needed assemble a diverse project team that would be somewhat capable of effectively responding to the different lived experiences of the proposal's end users. The approach is limited, and links to either the design methodology or overall design response. The potential to create high quality inclusive project outcomes is limited.
Poor	The submission demonstrates a poor understanding of the approach needed assemble a diverse project team that would be capable of responding to the different lived experiences of the proposal's end users. The approach is under-developed with no link to either the design methodology or overall design response.
Unacceptable	An appropriate understanding of the requirements has not been met. The approach fails to demonstrate how the bidder would assemble a diverse project team and how this is integral to both project outcomes and design methodologies.

Scoring Spreadsheet Template

This excel template has been developed to assist commissioning authorities with recording scores as part of the evaluation process. This can be tailored accordingly to your project requirements. For a downloadable version of this excel file please visit;

<https://www.london.gov.uk/programmes-strategies/shaping-local-places/advice-and-guidance/procurement-architecture-urbanism-framework>

ABOUT GOOD GROWTH BY DESIGN

The Mayor's Good Growth by Design programme seeks to enhance the design of the built environment to create a city that works for all Londoners. This means development and growth should benefit everyone who lives here. As such, it should be sensitive to the local context, environmentally sustainable and physically accessible.

The programme calls on all involved in London's growing architectural, design and built environment professions to help realise the Mayor's vision.

Good Growth by Design uses the skills of both the Mayor's Design Advocates and the wider sector. This includes teams here at City Hall, the London Boroughs and other public bodies.

The programme covers six pillars of activity:

SETTING STANDARDS & INFORMING DELIVERY

Undertaking design research and identifying best practice in architecture, urban design and place-shaping, to support the development of clear policies and standards, and improve the quality of London's built environment.

ENSURING QUALITY

Ensuring effective design review across London, including through the London Review Panel.

BUILDING CAPACITY

Enhancing the GLA Group's and borough's ability to shape new development that will deliver good growth.

SUPPORTING DIVERSITY

Working towards a more representative sector and striving for best practice while designing for diversity.

COMMISSIONING QUALITY

Ensuring excellence in how the Mayor and other public sector clients appoint and manage architects and other built environment professionals.

CHAMPIONING & LEARNING

Advocating for the sector and for best practice and evaluating the programme's impact.

THE MAYOR'S DESIGN ADVOCATES

The Mayor's Design Advocates are 42 built environment professionals. They were chosen for their skill and experience to help the Mayor support London's growth through the Good Growth by Design programme. They are independent and impartial, and provide support, advice, critique and expertise on London's built environment. The group includes practitioners, academics, policy makers and those from community-led schemes.

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