



Homes
England

Homes England Advice Notes: Why community engagement matters and how we can deliver locally relevant social value

Advice Note 2: Using community engagement to understand and deliver 'locally relevant' social value outcomes



About the Homes England Community Engagement Advice Notes

Homes England knows how important it is to effectively engage with, and listen to, communities.

At Homes England, we aim to capture locally relevant ideas and suggestions that reflect opportunities for transformation and regeneration within communities. By engaging meaningfully with local communities and stakeholders, we can identify what matters most to them. This knowledge enables us to shape projects that deliver lasting social value outcomes, benefiting the community both now and in the future.

We consider supporting other public sector bodies in defining their approach to community engagement and social value as a key part of our role.

The Community Engagement Advice Notes have been created by Homes England to share ideas and suggestions with local government and their partners.

The advice notes aim to promote meaningful community engagement and support the understanding and delivery of 'locally relevant social value', linked to the planning, housing and regeneration development process.

There are two advice notes:

Advice Note 1: Establishing a clear starting point for community engagement

For more information on community engagement and social value definitions and principles, please refer to Advice Note 1.

Advice Note 2: Using community engagement to understand and deliver 'locally relevant' social value outcomes

Advice Note 2 offers some practical suggestions and approaches to deliver dedicated and meaningful community engagement to maximise locally relevant social value.

Why community engagement matters

Homes England considers community engagement to be critical to maximising social outcomes on our projects. In 2023, we launched our Strategic Plan 2023-28 which puts communities at the heart of our mission:



“ We know that engagement with communities is critical to designing places that meet peoples’ needs. We expect our partners to ensure that people can influence housing and regeneration activities in the places where they live. We will also encourage the development of effective plans for the long-term stewardship of places to ensure their continued success.

”

Homes England Strategic Plan 2023-28

At what stage of the planning process can we generate locally relevant social value?

Homes England aims to understand and deliver locally relevant social value throughout the planning, housing and regeneration process.

By engaging with communities at various stages, we can identify and embed social value from the project's inception, maximising its impact. There are opportunities to start thinking about social value at the early stages of a project lifecycle. We have found that the earlier social value is embedded from project inception, the greater the impact.

Thinking about social value objectives and outcomes early in the process can generate benefits such as:



Ensuring that local needs and aspirations are captured and can influence the project from the outset



Building trust and bringing people along the journey by demonstrating that locally relevant social value is integral to a project



Establishing a knowledge base to inform Business Cases, masterplans and planning strategies, which in turn help inform the decision-making process.

Community engagement linked to the RIBA stages

The 'Plan of Work' from the Royal Institute of British Architects (RIBA) sets out the eight RIBA stages of a project.

This framework can be used to understanding when community engagement activities can be linked to locally relevant social value throughout the project lifecycle. For further information, please refer to the RIBA Engagement Overlay to the RIBA Plan of Work.



Grimsby Town Centre

Homes England is working with North East Lincolnshire Council to develop an agreed starting point for definitions, motivations, guiding principles and objectives for community engagement and social value.

We have identified and agreed future next steps for any planned engagement and social value activity.

This process has helped to ensure that the project embeds an outcomes-focussed approach at this important early stage.

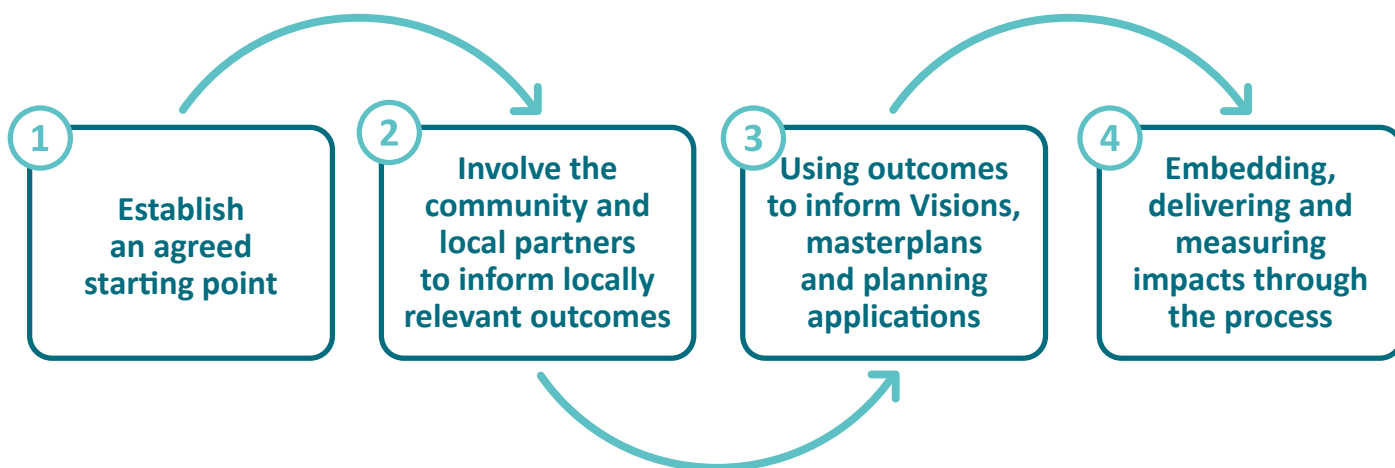


Image Courtesy: Alexandra-Dock-Housing-site

Putting it into practice: what steps are involved?

Every community, area and project are unique and there is no one-size-fits-all approach to community engagement. Therefore, locally relevant social value opportunities will look different in each place and in every project.

While there are many approaches to effective community engagement, at Homes England we find that there are often set common practices which are applicable to most projects, which are set out below.



1 Establish an agreed starting point

The first step is to develop an agreed purpose and set of objectives for community engagement and how they will support social value objectives.

Tailoring the engagement strategy to the project and context requires a good understanding of community profiles, including potential needs and opportunities.

Being mindful of relevant policy, guidance and strategy considerations, develop consensus on what is meant by 'community engagement' and 'social value', at a partnership, project or proposal level.

From a social value perspective, we look for some consensus on agreed social value objectives. Importantly, we then look to create and agree the next steps.



“ If your stakeholder engagement data includes recurrent priorities, issues, or concerns this indicates a stakeholder need. ”

A Guide for Delivering Social Value on Built Environment Projects (UKGBC)

Delve into data, local policy, strategy and guidance documents to identify socio-economic trends

Existing data held by the local authority

- Ward demographic summaries
- Local Plans
- Neighbourhood Plans
- Local authority evidence bases, such as Strategic Housing Market Assessments, Economic Growth Strategies, Climate Change and Sustainable Development Strategies, Joint Strategic Needs Assessments and Social Infrastructure Audits.
- Primary data gathered, such as resident surveys and panels, Post Occupancy Surveys and community meeting notes

Publicly available sources of data

- Census, Business Register and Employment Survey, and Annual Population Survey (produced by the Office for National Statistics)
- Indices of Multiple Deprivation and English Housing Survey, produced by the Ministry of Housing, Communities and Local Government (MHCLG)
- A local authority's Joint Strategic Needs Assessment
- Local Authority Health Profiles, produced by the Office for Health Improvement and Disabilities

Conduct a stakeholder mapping exercise

Geography, function and shared characteristics all inform how we define ‘community’:



Geography

For example, all residents living within proximity to the red line boundary of a scheme



Function

People living and working in an area



Characteristics

Groups with specific needs such as those with disabilities.

Consider why certain groups are important and, going forward, how they should be approached. At Homes England, we have developed an approach that does this, and which also looks to support discussion on the ‘wider area of impact’ of a project.

Including seldom-heard groups is important. Identifying these groups early on in the process can create the opportunity to choose methods and channels of communication that will work best for the target groups.

Considering asking partners to help you reach and effectively engage with different segments of the community.

Setting up a project Steering Group

A Steering Group can help formalise relevant internal teams and key partners to manage and guide the engagement process.

Step one: Guiding questions

- What is the area of influence of the project? Depending on the scale of development or types of uses, the area of influence could be a neighbourhood, a group of wards or a local authority.
- Does your local authority have up-to-date data, policies and strategies on demographic and socio-economic trends?
- Does your local authority have systems to share data and information across teams?
- Does your local authority have information from residents’ surveys or other primary data sources which could provide useful information on local opinions, aspirations and concerns?
- What key insights can be gained through conversations with partners?
- How might be the current needs and priorities of the existing community differ from that of the future community.

② Involve the community and local partners to inform locally relevant outcomes

Create an Engagement Plan

Information gathered during step one will help inform step two, in that an existing knowledge base helps to inform the approach when planning for engagement activities. However, it should be acknowledged that desk-based analysis and internal conversations - what we, at Homes England, call the 'passive' stages - can only go so far.

Speaking with communities and partners is key to gaining detailed local insights and developing a deeper understanding of place - specific needs and opportunities - at Homes England, we call this the 'active' stages of community engagement.

To do this requires developing a strategy into an Engagement Plan. This is all about the "what, why, when, how, and who" to support the implementation of a community engagement plan in a meaningful and timely way. Consider this alongside the broader project timeframe to ensure the timely opportunity to input community feedback to inform decision-making as well as leveraging opportunities to maximise locally relevant social value.

It's also important to identify the resources needed to deliver the plan, such as having skilled, independent facilitators and organisers to lead and manage the engagement activities, funding for events and materials, and tools or software for communication content and data collection.

Identify negotiables and non-negotiables

Understand which elements of the project local stakeholders can influence to help tailor your approach to consultation and the questions and topics that will be put forward. Where negotiables exist, potential opportunities to empower stakeholders to help inform decisions will also be found.

Consider the appropriate level of engagement

Identifying the level of engagement appropriate to different stakeholders and groups will help inform the engagement methodology. This may range from informing - one way communication sharing details of the project - through to empowering communities, for example through co-design processes.

At some stages it can be more appropriate to inform communities, whilst at others it may be beneficial to more deeply involve a community through co-design workshops. Ensuring that communities are well informed also means that they can participate in consultation in meaningful ways.

Using a tool such as the Tapestry of Participation, can encourage a purposeful consideration of the range of engagement activities that offer different levels of community participation across the stages of a project.

	Informing	Consulting	Involving	Co-creating	Empowering
Objectives	Communicate process, parameters and progress	Create safe space to unearth and explore diverse views and opinions	Unearth user experience and specialist knowledge	Develop a shared vision and design brief	Shared design-making
Engagement activities	(Digital) survey	Focus group	Design training	Visioning/co-design workshop	Co-designing codes
Recurrence	One-off	Occasional	Regular	Integral	Leading
Participants	Informed observer	Consultee	Design workshop participant	Member of working group	Project lead
Expertise centred	A range of expertise required including local expertise, user experience / facilitation, specialist and technical expertise				

Source: The Design Council - The Glass House - Tapestry of Participation / Quality of Life Foundation

Think creatively about the tools and methodologies for engagement

Planning bespoke engagement activities to focus on the topics that matter most to the community groups can be the best approach to meaningful engagement. At Homes England, we advocate for a hybrid approach.

Using a combination of both digital tools and in-person events helps reach some sections of the local community who are less likely to participate and improve the overall success of the engagement activity.

It is important to use simple language and clearly explain the purpose of the engagement activities to participants. In multilingual areas, providing materials in different languages is beneficial.

Ideas for in-person activities:

- **Drop-in events and exhibitions**
Create an opportunity to discuss the development proposals and provide feedback in-person.
- **Peer-to-peer**
Working with community engagement specialists who either from the same community or from similar backgrounds.
- **Structured workshops**
Suited to a smaller number of participants, for instance when discussing the opportunities and challenges of a project and how it may impact a particular group or demographic, such as the elderly population.
- **Community panels or forums**
Bring together a larger number of participants to ensure the voice of the community is considered through formal and informal structures.
- **School assemblies and workshops**
Reach younger age groups and their parents

Ideas for using digital techniques:

- **Social media platforms, apps, email campaigns**
Help engage hard-to-reach groups such as younger people, and drive traffic to other digital forms such as a website.
MHCLG is currently supporting local authorities across the country, via the PropTech Innovation Fund, to implement innovative digital citizen engagement tools and platforms to help increase the levels of community engagement.
- **A dedicated project website**
Provide all details about a proposed development, and can be regularly updated by the project team. Available 24/7.
- **Using AI and digital modelling**
Help members of the community visualise a proposed development.

Step two: Guiding questions

- Has your local authority cross-referenced the list of community groups with the demographic and socio-economic analysis, to identify the greatest need for targeted outreach and engagement?
- What community engagement approaches and methods will work best for different groups?
- What level of engagement is best suited, reflecting on the scale of the development and the relates to the specific project or point in time in the planning, housing and regeneration process?
- Is your messaging clear and consistent across all communication channels?
- Who would be best placed to facilitate community conversations to ensure unbiased and fair dialogue?

Hold collaborative conversations with communities and stakeholders

Homes England Sustainability and Design Engagement Tool

Homes England, our Sustainability and Design Engagement Tool helps us structure collaborative conversations with key partners and stakeholders.

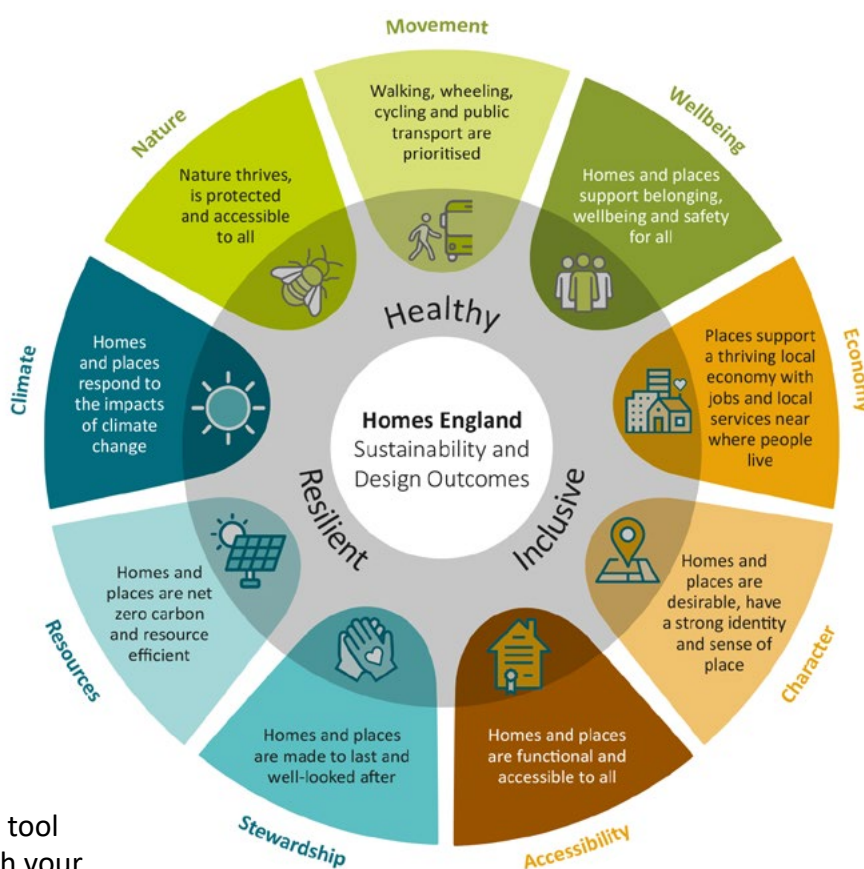
It is designed to help people talk methodically about how they feel about a place, using a series of themes that aim to ensure homes and places are healthy, inclusive and resilient.

The Sustainability and Design Outcomes shown below encompass a broader understanding of value with social value embedded throughout.

The engagement tool has been developed to help use to understand what the outcomes mean locally for each project, tracking process against these outcomes throughout a project.

Local authorities may also like to use this tool as one approach to guide discussions with your communities. We hope this tool will help you:

- Deepen your understanding of local context;
- Achieve consensus around a common purpose;
- Inform a vision for the project; and
- Develop a common understanding of the outcomes to be achieved.



Connect people into the planning and development process

Social value can be created by the very process of collaborative community engagement.

By including communities into the process, opportunities for learning about development proposals can lead to increased awareness, skills and confidence for community members when engaging with planning, housing and development process.

This can, in and of itself, create social value helping local communities to becoming more informed about planning and development.

Creating Place-Based Indicators to capture and measure locally informed outcomes

Drawing on findings from the research and engagement undertaken in steps one to three, we can now identify locally informed, locally relevant social value outcomes and indicators.

At Homes England we use an inclusive process that we refer to as creating 'Place-Based Indicators'. We use our Sustainability and Design Engagement Tool to frame collaborative conversations and help us to identify a common understanding of the local community, local issues, key priorities, and shared values.

Place-Based Indicators are:

- A set of outcomes that the project aims to deliver
- Defined issues and opportunities impacting a given place over a given period of time
- Locally agreed and owned by local communities and interested stakeholders
- Combine findings from quantitative evidence and collaborative conversations
- SMART: Specific, Measurable, Achievable, Realistic, and Time-Bound



Northstowe, Cambridgeshire

The project team, comprising of Homes England, South Cambridgeshire District Council and the wider professional team, are currently taking a renewed approach to community engagement.

We have developed a set of Place-Based Indicators to capture locally relevant social value opportunities. The PBIs have been used to inform an agreed Community Engagement and Social Value Strategy, named Building One Community.

A working group is now in place with agreed terms of reference to inform and guide the strategy going forward with real purpose and energy.



3 Using outcomes to inform Visions, masterplans and planning applications

Once agreed, Place-Based Indicators can be used throughout the next stages of a project to empower residents, inform future community engagement, inform business cases, future visions and masterplans.

The PBI process supports a project to adopt an outcomes-focused approach, which offers the following benefits throughout the planning, housing and regeneration process:

- Directly inform project level community engagement approaches and used as a basis for further discussions with the community throughout the development process
- Inform Visions and masterplan options
- Inform any social value asks for consultants or contractors
- Compare and track the progress delivered against the priority themes that are relevant to the local community
- Inform planning applications and supporting technical work such as Statement of Community Involvement and Equality Impact Assessments
- Develop a locally relevant Social Value Strategy for projects and proposals
- Benchmark and reflect at every stage of a project's lifecycle: during pre-planning design or co-design, at planning submission, during construction and after occupation.



Great Houghton, Northampton

An inclusive engagement approach was designed to gather community input and ensure diverse voices were heard. We offered a variety of activities at every stage including public drop-in sessions, online workshops, town hall meetings, a digital exhibition, leaflets, newsletters and an online survey.

We also hosted engagement events in neighbouring areas to ensure a diverse range of perspectives were heard, reflecting the unique needs and priorities of each locality.

We regularly provided updates to the community on progress, to maintain engagement and build trust, even if project timelines or project elements were delayed.

The community engagement activity has identified locally relevant social value priorities, which have informed the development of our project specific Social Value Strategy and Statement of Community Involvement.

Step three: Guiding questions

- What are the short, medium and long-term locally relevant social value indicators?
- What tools – quantitative and qualitative – are available to measure the indicators?
- How often the indicators be measured and how does this link to key milestone within the project?
- Who will take ownership of the measuring and monitoring process and who will feed into this?

④ Embedding, delivering and measuring impacts throughout the process

Understanding, embedding and delivering locally relevant social value with effective community engagement does not have to add any additional cost or time to the process of taking projects forward. Adopting an embedded approach can deliver much greater locally relevant outcomes though for people and places. Having an agreed way to measure and monitor impacts is important and should be agreed early on between the key project partners.

Communicating outcomes and impact to stakeholders

Reporting back to communities and continuously evaluating, consulting, and improving on approaches is an iterative process that will take place throughout the development stages and phases of a scheme. Depending on the scale of the project, there may also be additional rounds of consultation as the design develops.

Consider methods for reporting back to stakeholders on progress and outcomes. For example, Consultation Reports and Business Cases can outline how the community has been engaged, and how their feedback has informed the plans: 'you said, we did'.

Develop monitoring and measuring procedures

Measuring and quantifying the social value created throughout the process can be carried out to track how your chosen Place Based Indicators are being delivered.

Capturing the delivery of impact to people and communities is equally important. Post-completion surveys and analysis is a good way to learn. At Homes England, we look to capture the delivery of locally relevant social value via a standardised 'Social Impact Form' and we look to inform contractors' and partners' social value requirements through using the agreed PBIs.

Further engagement to keep the conversation with the community going

In order to ensure that future engagement is undertaken with, and not to, communities, we advocate co-design and co-production into the process as much as we can. When looking to include 'seldom heard' groups, we look for opportunities for peer-to-peer engagement to take place.

Now that relationships with local communities and key stakeholders have been established, it is important to find opportunities to keep the community up to date. For example, this may include:

- Providing updates on how the project is delivering community benefits
- Sharing information on job creation and how the local community could take up new employment opportunities
- Communicating throughout the construction phase

This could be done via website updates, newsletters, social media, workshops and regular forums with the local community.

Step four: Guiding questions

- Does your local authority have systems in place to track communications with key stakeholders to ensure that they engage regularly?
- Does the project have a strategy to maximise the visibility and accessibility of the community engagement activity across different communities and neighbourhoods?

About Homes England

Homes England is the Government's housing and regeneration agency.

Homes England is committed to effective community engagement in our projects. In 2023, we launched our Strategic Plan 2023-28 which puts communities at the heart of our mission:

"We drive regeneration and housing delivery to create high-quality homes and thriving places. This will support greater social justice, and the creation of places people are proud to call home....."

You can read about our strategic objectives in our strategic plan online. Go to [GOV.UK](https://www.gov.uk) and search for 'Homes England strategic plan'.

The Homes England Community Engagement Team

The Homes England Community Engagement Team supports colleagues and partners to embed best practice approaches to community engagement.

From the outset, we work with partners and local communities to articulate the vision and ambition for the homes and places we enable. We complete regular project reviews and help teams to establish criteria for measuring success to demonstrate the impact of our approach.

The Community Engagement Team has produced the Community Engagement Advice Notes. To view these online go to [GOV.UK](https://www.gov.uk) and search for 'Housing information hub'.

Get in touch to find out about:

- The Homes England Sustainability and Design Outcomes Engagement Tool
- Ideas to develop Place Based Indicators that reflect local context and community
- Advice for commissioning consultants to develop a community engagement strategy
- Advice on how community engagement informs the Visioning process as part of developing a masterplan