THE NATIONAL HIGHWAYS SOCIAL VALUE TOOL

Administrator User Guide **Version 1: May 2022**

Background

At National Highways, our work to connect the country goes beyond operating, maintaining and improving the Strategic Road Network. What we do, and how we do it includes creating opportunities for individuals and communities and positive change for the environment through social value.

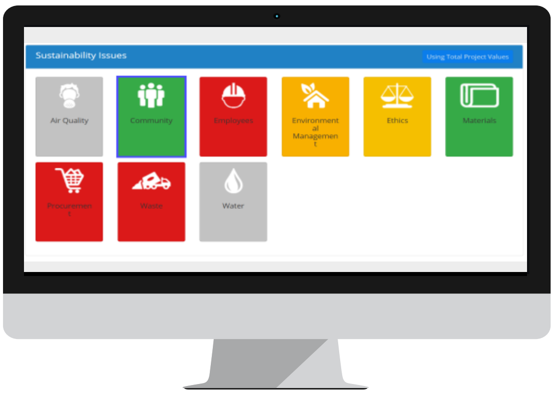
We define social value as: **"The benefits that National Highways and its supply chain delivers for people, environment and the economy."**

Aligning with government guidance on the 'levelling up agenda', we are working in partnership with our suppliers to develop a wider-reaching, consistent approach to social value delivery and reporting.

Through this collaborative approach we will:

- **Create the greatest amount of social, environmental and economic benefit to communities through every pound of investment.**
- **Stimulate innovation within project delivery and business models to optimise the impact that social value / community benefits offer.**
- **Monitor and evaluate benefits delivered across our supply chain and share best practise models for future work.**
- **Create a centre of excellence to evolve our approach to social value alongside our supply chain and those operating in the wider construction industry.**
- **Leave a positive legacy for our customers, the wider community and everyone working for National Highways and as part of our supply chain.**

Introduction



The Social Value Tool is a cloud-based sustainability performance reporting system designed to monitor the social value performance of an organisation and its supply chain. **Red, Amber, Green** dashboards indicate performance against the key social value issues and indicators that are material to an organization and aligned with its values. If no targets are set within the Tool then dashboards show as **Grey**.

The purpose of this document is to compliment the live training and/or training slidedeck which is provided for all Administrators of the Tool.

It is divided into 3 sections:

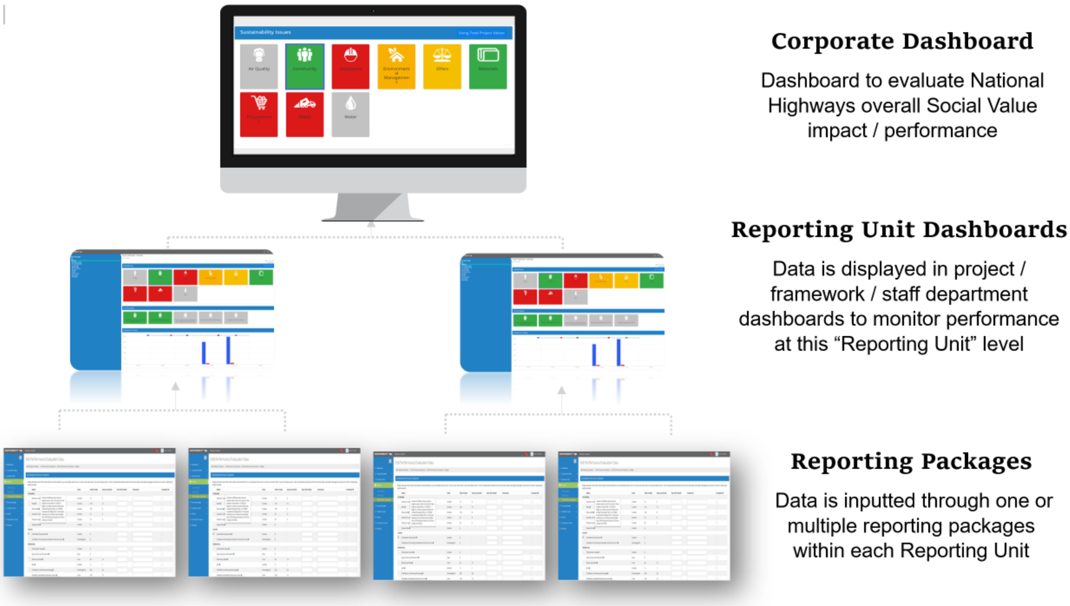
- Issues, Metrics and Indicators covered by the Social Value Tool
- Steps to set up your account
- Tips to navigate The Social Value Tool dashboards

Issues, Metrics and Indicators covered by the Social Value Tool

Social Value Issue	Metric / Indicator Name
Economic Prosperity	Number of full-time equivalent employees, within your organisation, supported under the contract
	Number of national Skills Academy for Construction roles (excluding apprenticeships)
	Number of weeks of apprenticeships (excluding National Skills Academy for Construction roles)
	Number of apprenticeships completed (excluding National Skills Academy for Construction roles)
	Number of hours dedicated to educational/career engagement events (excluding work placements)
	Number of weeks of work placements
	Number of hours of accredited training delivered
	Number of registered qualifications gained
	£ value of contract opportunities awarded under the contract (start-ups and micro)
	£ value of contract opportunities awarded under the contract (Small and Medium Enterprises)
	£ value of contract opportunities awarded (Voluntary organisations, Charities, Social Enterprises and mutuals)
	Total £ value of spend with diverse suppliers
	Number of local employees (full-time equivalent) on contract
	Number of long-term unemployed (>12 months) (full-time equivalent), excluding “NEETS” working on scheme
	Number of employees not in Employment Education or Training (full-time equivalent) working on a scheme
	Number of people 'other new to the industry' (full-time equivalent) working on a scheme
Equality, Diversity, Inclusion	Number of hours Equality Diversity Inclusion / Fairness Inclusion Respect training delivered
	Number of women (full-time equivalent) working on a scheme
	% of full time women employees working on a scheme
	Number of B.A.M.E employees (full-time equivalent) of those who self-declared this, working on a scheme
	% of full time B.A.M.E employees working on a scheme
	Number of LGBTQ+ employees (FTE), of those employees who self-declared this, working on a scheme
	% of full time LGBTQ+ employees working on a scheme
	Number of armed forces veterans (full-time equivalent) working on a scheme
	% of full time armed force veteran employees working on a scheme
	Number of disabled people (full-time equivalent) working on a scheme
	% of full time disabled employees working on a scheme
	Number of people who have been cared for children (care leavers) (full-time equivalent) working on scheme
	% of full time care leaver employees working on a scheme
	Number of rehabilitating or ex-offenders (full-time equivalent) working on a scheme
	% of full time rehabilitating or ex-offender employees working on a scheme
	Number of people classified as homeless (full-time equivalent) working on a scheme
	% of full time employees classified as homeless wokring on a scheme
	% of companies with gold level Defence Employer Recognition Scheme (ERS)
	% of companies with silver level Defence Employer Recognition Scheme (ERS)
	% of companies with bronze level Defence Employer Recognition Scheme (ERS)
	% of companies with no Defence Employer Recognition Scheme (ERS) level
Community Wellbeing	Number of maternity leave/returners (full-time equivalent) working on scheme
	Number of employees who have the options to work flexibly included in their contract terms
	% companies in supply chain with measures to improve physical & mental health & wellbeing of employees
	Number of hours delivered to volunteering and community project initiatives

Using the National Highways Social Value Tool

The Social Value Tool is built on a reporting hierarchy:



Reporting / Business Units

The Social Value Tool is built using several **Reporting Units**, which bring together data into a dashboard. These Reporting Units are established by the Tool support team at the Supply Chain Sustainability School. They are referred to as "Business Units" within the Tool.

A company account can have, directly below it, multiple business units and projects, which all contribute to the data in the company dashboard. In turn, business units can have other business units and projects within them. These will contribute to the data in the 'parent' business unit dashboard.

For example, the RDP (Regional Delivery Partnership) framework will gather data from suppliers and bring them together within separate schemes which are classed as Reporting / Business Units. They then feed upwards into the RDP Reporting Unit Dashboard. Other frameworks (eg SMP Alliance / SDF) will gather data directly into a single Reporting/Business Unit.

Creating a new Reporting / Business Unit

NB – please liaise with Supply Chain School contacts if you are considering creating a new Reporting Unit.

1. Go to the company (or business unit) dashboard where the new business unit will feed into
2. In the Admin menu, select 'Settings'
3. Scroll down to the Business Units table
4. Click 'Add a Business Unit' found on the top-right of the table
5. Complete the relevant details and 'Submit'
6. To create additional business units, repeat steps 1 to 5

To create a business unit within an existing business unit, go to the existing business unit's dashboard and repeat steps 2 to 5.

How to Edit a Reporting / Business Unit name

1. Go to the business unit dashboard, by clicking on the relevant link in the left-hand menu
2. In the Admin menu, select 'Settings'
3. Under Corporate details, edit the Name field
4. Click 'Submit'

The Role of an Admin

The admin is responsible for managing the account for their Reporting / Business Unit. This means setting up the right suppliers, keeping accounts up to date and checking supplier engagement and regular use of the Tool.

An admin has the highest level of authority within each reporting level of the Tool.

They have the highest level of editorial authority and are able to create, make changes to the settings of and delete the following:

- **business units, projects and reporting packages;**
- **other users;**
- **metrics and indicators;**
- **targets and thresholds.**

Admins also have the highest level of viewing authority. They view all business units, projects and reporting packages they are set up in. They see all reports submitted and have the ability to approve or reject reports. They see all sustainability measurement data, progress against targets and the RAG (Red, Amber, Green) status of all indicators. They also see the status of reporting packages (Approved, Pending Approval, Requires Revision or Nothing Received). Admins can see the names of all individuals involved, what level of authority they have and what project or reporting package they are associated with.

How to add a Project within your Reporting Unit – to enable suppliers or National Highways divisions to report data

NB – for further information see "Projects" under the Admin section of the Tool User Guide.
Each supplier or colleague team/group you wish to report within your Reporting Unit is the equivalent of a "project". To add supplier organisations or colleague teams (or "projects") into your Reporting Unit:

1. Go to the Reporting Unit (business unit) you would like add suppliers for.
2. In the Admin menu, select 'Settings'
3. Scroll down to the 'Projects at this level' section and click on 'Add a Project'
4. Enter the project name which will contain the name of the supplier organisation and the Reporting Unit name. *E.g., Aggregate Industries - A303 Sparkford to Ilchester Dualling*
5. Select 'Template Suppliers' from the dropdown in the 'From template' section.
6. Define the project settings according to their reporting requirements. 'Reporting from' defines the beginning of the first reporting period; when reporting should commence. 'Reporting to' defines the month after which reporting will cease. Use today's date.
7. The option 'Every & Reporting Increments' define the frequency of the reporting periods. Please select 'every month'.
8. Click 'Submit'

How to add a Reporting Package so Suppliers / Staff Teams can submit their regular reports

After setting up a project (supplier) you then need to add the corresponding reporting package, which is where your suppliers/staff teams will input information.

1. Go to the project where the new reporting package will feed into
2. In the Admin menu, select 'Settings'
3. Scroll down to the 'Reporting Packages in Project' and select 'Add a Reporting package'.
4. For consistency, enter the name of the company (or staff team) and the word Reporting. *E.g., 'Aggregate Industries Reporting'*
5. Click 'Submit'

Once added, follow these steps to configure the first reporting period:

1. Go to the Reporting package, click on the Admin menu and select 'Settings'
2. Select first reporting period – ie month you'd like your suppliers / staff teams to begin using the Tool
3. Add the reporting date. Reporting deadlines are usually 2 weeks after the end of the period. This is to give users enough time to collect data
4. Appoint the 'Reporter' to the package.
5. Click Submit

How to add/delete users

Users are members who have access to a specific project.

What you will need to know before: Email addresses of users and their role within the account. In the case of Suppliers or Staff Teams, they will need a 'Reporter' and 'Approver'
To add or delete users use the following steps:

1. Log in as an Admin
2. Go to the corresponding project level (supplier / staff team).
3. Click on the 'Company' menu located at the top right- hand side of the screen and select the option 'Members'
4. To invite new members: Click on 'Send invite' under the section 'Members' to add them individually.
5. Add their email addresses and choose the corresponding Authority Group/role.
6. To delete members: Click on the cog button of the user who you wish to delete and click 'Delete'

Checking who the users (reporters, approvers) are in a Reporting Unit.

1. Log in as an Admin
2. Go to the corresponding project level (supplier / staff team)
3. Click on the 'company' menu located at the top right- hand side of the screen and select the option 'Members'
4. Under the 'Members' section you will be able to see who the users are and their specific roles,

Note: *A 'Pending invitation' status will appear if you have invited a user to join the Tool but the invitation has not been accepted yet.*

How to know if someone is reporting

To identify who is/isn't reporting you will need to check the reporting packages individually.

1. Click on a reporting package
2. Select 'Reports submitted' on the 'Reporting Package' menu. This will display the list of submitted reports and their status, e.g. 'Pending approval' means that data has been submitted but has not been approved yet.

To see more details on how to identify reporting gaps, see 'Knowing the gaps in your data' in the section 'Tips for navigating the Tool dashboards'

How to export a report

There are several types of reports in the Tool. Examples are: export indicators, export inputs (metrics), export project statuses (to see who is reporting/who isn't), export project members (to see who has access to each report. See some useful Tool Training on Exporting Reports: https://youtu.be/M2AOw5A0DL4

1. Go to the corresponding business unit
2. Click on the 'Export' menu located on the right-hand side of the screen
3. Select the format you require and click on 'Download'

TIPS FOR NAVIGATING DASHBOARDS

Applying the correct date settings

At the top-right of each user dashboard, you will find the **date settings**. Adjust these dates to ensure you are reviewing data for the right period. Key points to remember:

- The **colour of the tiles** will correspond to the performance of indicators up to the "to" date you have selected. By changing the "to" date you may notice the tiles change colour.
- Only data from **full reporting periods included within the dates you have selected**, excluding those selected, will be displayed in the dashboards. For example, in a project with a calendar month reporting period, by selecting "June 28th 19 to Feb 28th 20" the dashboards would display data for from July 1st 19 to Jan 31st 20.
- The **date settings will be saved for the current dashboard only** so make sure to check the date settings every time you access a new dashboard in your account hierarchy.

Knowing the gaps in your data

In project-level dashboards, there is a table that displays the status of the reporting packages within the project. This table shows, for each reporting package and reporting period, if data has been:

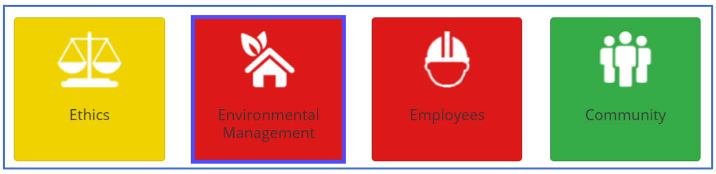
- **No report:** no data has been reported yet and it is not overdue – if applicable, the reporter will submit data in the future, or the reporter is no longer required to report against the project
- **Nothing received:** the data is overdue and needs to be submitted by the reporter; no data for this reporting package and period will contribute to the dashboards
- **Requires revision**: data has been submitted but it has been rejected; the data will not appear in or contribute to dashboard calculations until it has been amended and approved
- **Pending approval**: the data has been submitted but is not yet approved; the data will not appear in or contribute to dashboard calculations until it has been approved
- **Approved:** the data will be included in the dashboard calculations

To: Mar 31st 20	To: Jun 30th 20	To: Sep 30th 20	To: Dec 31st 20
Pending Approval	Pending Approval	Nothing Received	No Report

To: Aug 31st 19	To: Sep 30th 19	To: Oct 31st 19	To: Nov 30th 19	To: Dec 31st 19	To: Jan 31st 20
Approved	Approved	Approved	Approved	Approved	Approved
Approved	Approved	Approved	Approved	Requires Revision	Approved
Requires Revision	Approved	Approved	Approved	Approved	Approved

It is therefore important for users at a project-level to review the reporting package status tables in order to assess where there may be gaps in the data used to generate the dashboards.

Understanding the colour



If you have applied targets and thresholds to indicators, the dashboard tiles at the corresponding levels will be red, amber or green. As a reminder:

- A **green tile** means the target has been **achieved** – this is your incentivised or stretch target
- A **red tile** means that **target and threshold have not been achieved**
- An **amber tile** means that the threshold has been achieved (e.g. your contractual requirement) but not the target (e.g. your stretch/incentivised target)
- A **grey tile** means **no target** has been set

Tip*: at an issue level, the colour of the tile will correspond to the worst colour in the indicators that sit within that issue. For example, if you have five indicators within an issue, and all indicators are green (targets are being met) except for one tile that is red (threshold and target not met) then the Issue tile will be red.*

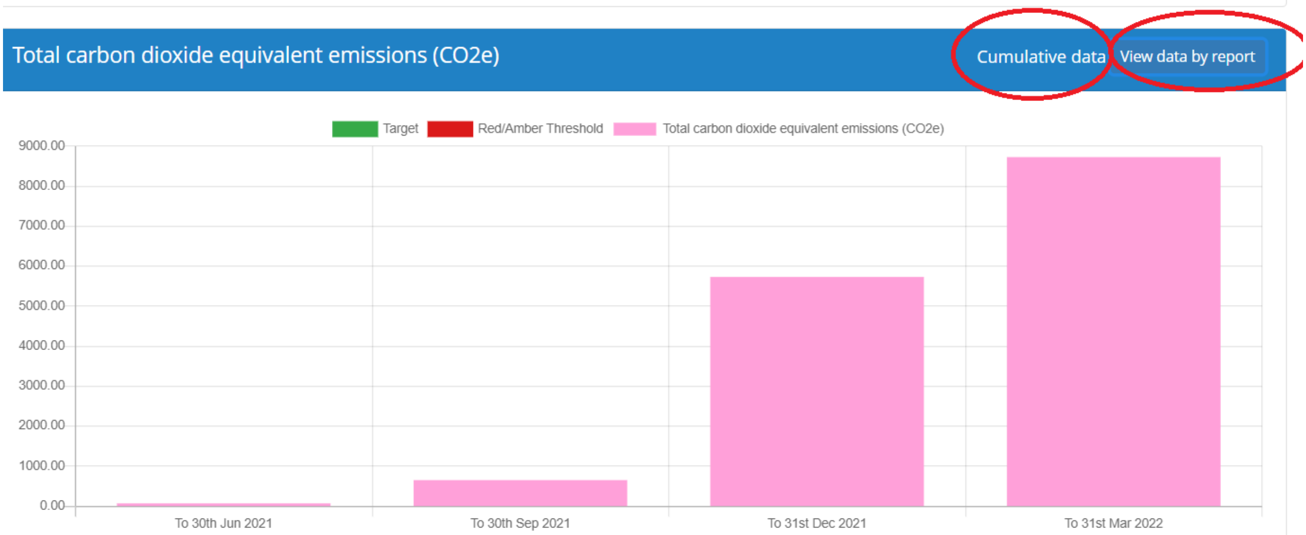
Following the colour

Within just a few clicks, you should be able to identify which parts of your project, supply chain or organisation are the cause of targets not being met.

When viewing a dashboard, we recommend users follow the colour. If you are looking for good news stories, then identify green tiles at an issue level and then the green tiles within those. Identify red tiles if looking for areas for improvement. The indicator values displayed in the indicator graphs are calculated using all the reported values against the relevant metrics, anywhere in the reporting hierarchy that is below the currently viewed dashboard.

Using Graphs

The graphs are a great feature of the Tool. And now there is the option to switch from cumulative to data by period (this is one of the new developments, also asked by National Highways) - Admins love that and it helps them to understand data.



Understanding the performance breakdown

The tables below the indicator graphs show a breakdown of performance. This will enable you to identify (1) which stakeholders are reporting data and (2) their performance against the selected indicator.

To: Aug 31st 19	To: Sep 30th 19	To: Oct 31st 19	To: Nov 30th 19	To: Dec 31st 19	To: Jan 31st 20
2.70	2.56	2.50	2.41	2.33	3.26

The first table (performance of projects/reporting packages for the indicator) always shows the indicator performance of the projects or reporting packages that sit below the level you are currently viewing. When looking at these tables, please remember:

- **Cell with numbers:** show data that has been reported in the corresponding project or reporting package against the metrics that make up the indicator

- **Cells with colour:** show the indicator performance of the corresponding project or reporting package, using the targets set at that project or reporting package level. This means the table shows performance against targets set at a level below the dashboard you are currently viewing
- **Empty and grey cells:** indicate that not enough data has been reported in the corresponding project or reporting packages to calculate a value for the indicator. For example, if an indicator has a numerator metric and a denominator metric, and a reporter has only submitted data against the denominator then the indicator cannot be calculated so the cell will be empty and grey.

The second table (report metric values) is only available at a project level. It displays the cumulative reported values against the metrics that make up the given indicator. By clicking on the dropdown, you can see how each reporting package has responded against those metrics.

Period Starting	To: Oct 31st 19	To: Nov 30th 19	To: Dec 31st 19	To: Jan 31st 20	To: Feb 29th 20
CO2e from fugitive emissions ▾	0.00	0.00	0.00	0.00	
CO2e from travel & logistics in company owned vehicle ▾	1.59	2.92	4.65	7.32	
Supplier 2 reporter	1.59	2.92	4.65	7.32	
CO2e from total electricity consumption on site ▾	8.92	9.79	10.96	12.04	
CO2e from use of fossil fuels on site ▾	3.35	6.73	28.75	40.09	
Turnover in this period ▾	340234.00	752273.00	1151023.00	1538973.00	

Please note that an empty cell indicates no data was reported, however, some reporting packages may not be required to report against those metrics. To check this, go to the reporting package and review the list of metrics in their submitted reports.
Additional tip: by default, the data you see is cumulative. If you would like to see the monthly values, click on "Show monthly reported values" in the dropdown available in the Reporting metric values table header.

A blank is as good as nothing

An indicator value or metric value is blank in the dashboards when the data has not been reported. From a performance management perspective, it is recommended you consider all blanks to indicate the stakeholder has not achieved their targets. By taking this cautionary approach, you will avoid assuming targets are achieved without having the data to prove it and are likely to incentivise reporters to submit all their data.

Loading data

The dashboards are powered by a data-heavy calculation. As a result, when navigating from one dashboard to the next, please allow a few seconds for the dashboards to update accordingly. To speed this process up, you can always **refresh your browser** once you have landed on the desired dashboard.
If data has recently been submitted, the dashboards may still be calculating the updated results. The dashboard menu, located just below the data settings, allows you to **refresh the cache** – prioritising the calculations of the dashboard you're in. This is particularly useful if historic data was amended (for example, if a report was accepted and subsequently rejected by the approver, amended by the reporter, re-submitted and then approved).