SUPPLY CHAIN SUSTAINABILITY SCHOOL national highways Sustainability Tool measuring performance

THE NATIONAL HIGHWAYS SOCIAL VALUE TOOL

Reporter and Approver 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.

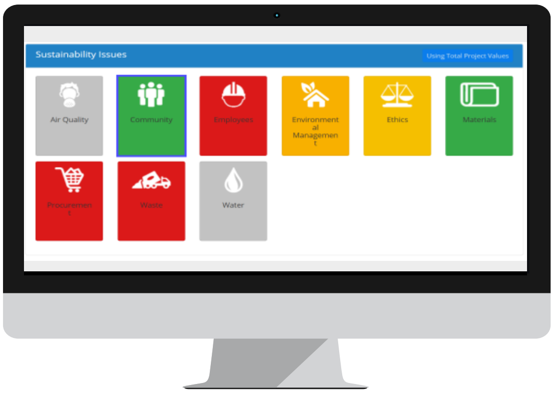
We define social value as: **“The benefits that National Highways and its supply chain delivers for people, environment and the economy.”**

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 Reporters / Approvers.

It is divided into 3 sections:

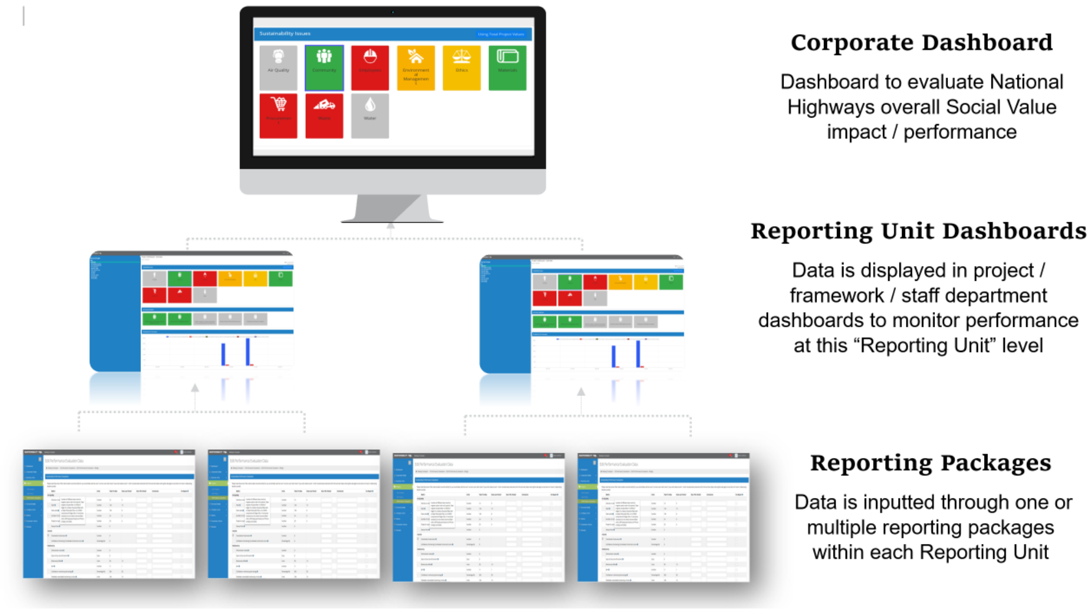
- Issues, Metrics and Indicators covered by the Social Value Tool
- Steps to set up your account
- Tips to navigate The Social Value Tool dashboards

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

Understanding Your Account

The Social Value Tool is built on a reporting hierarchy:



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.

Roles and Activity Descriptions for Reporter and Approver

NB – for more information please refer to relevant sections of the User Guide within the Social Value Tool platform

THE ROLE OF A REPORTER

The main role of a reporter is to enter their company's social value data into the tool.

The reporter will be required to input quantitative data, against specified metrics. The reporter may also add comments. A reporter can only ever report data for their specified reporting package(s); they can see dashboards for their reporting package and, subject to permission, may have access to the project, supplier or client dashboards above.

Within a project or supplier, several reporters can be assigned to multiple reporting packages. This can help to spread the reporting load across individuals within an organisation or project. Alternatively, and at an agreed cost, reporting can also be automatically carried out by data collection software applications via the Sustainability Tool API.

Once reported, the data will be approved or rejected by the Approver user and, once it is approved, will feed into the sustainability performance dashboards.

Getting setup - Tool Registration and log in

Reporters will receive an email inviting them to join a Company account on the Tool. They should follow the simple steps outlined in the email, which includes opening a web link to the Tool, entering their contact details and then creating a password.

Once registered, Reporters are able to access their account by going to https://nationalhighwayssocialvalue.sustainabilitytool.com/, clicking the 'sign in' button in the top right-hand side of the page, and entering their newly set sign-in details.

Project Registration

Once the Reporter has logged in, they will land on their 'User Dashboard' page. They should then be able to see a list of their Company Memberships as well as the Project Reports that they have been assigned responsibility for completing.

At this stage, the Reporter will need to accept their invitations to report on their project work packages. To do this, they need to navigate to the row in the 'Company / Project Invites' table that says their Project's name, click on the small cogs at the end of the rows, and then select 'accept' for each of their invitations. The work package/s name/s should then appear in the 'My Projects and Reports' table on their dashboard. To go into a work package, the Reporter can then simply click on the project title.

Navigation

Reporters should use the left-hand bottom menu (below the title, 'Business Units') to access their dashboards and reporting packages.

Please Note: There are different icons used in this menu to show the structure of a Company Project. Not all users will be able to see each level, but for reference:

- The Stacked office icon = Business Unit Names
- The Crossed Tools = Project Package Names

The first step to reporting is to access your Project Package. This is done simply by clicking the Project Package name in the bottom-left-hand-menu.

After selecting a package, the bottom-left-hand menu title will change from 'Business Units' to 'Reporting Packages'. You can then go into your required reporting package by clicking the package name in this same menu (remember, reporting packages have the crossed tools icons

Inputting your performance data

To report your data, click 'reporting package' menu, then 'report due' option in the top-left-hand menu once you are inside the correct Reporting Package as explained above.

As a Reporter, you will then be shown a screen of all of the performance metrics that you have been assigned responsibility for assessing.
Once you have entered all the data asked for in each metric and left your comments where possible, Reporters can simply click the 'Submit for Approval' button in the bottom right of the page.
Clicking this will open up a drop down option below for the Reporter, whereby they can leave an overarching comment for the data reviewer about the information they have provided.

By clicking submit, the Reporter will then be presented with a pop-up to confirm they are ready to submit their data which they then simply need to approve.

Adding documents

Reporters may be required to upload documentation to support the performance figures entered for specific metrics.
On the reports due page, Reporters will be able to see a full list of the metrics they are required to report against. If document upload functionality has been requested for a metric, Reporters will be able to see this at the end of the row for the required metric. There will be a grey button with 'select file' on it as well as a bracketed number which references the number of documents required.
To upload a document:

1. Click the 'select file' button at the end of the metric row on the 'Reports due' page. This will bring up a window to your files.
2. Select the file you want to use and click 'upload'. You will then be able to see the file on the 'Reports due' page at the end of the related metric's row. There will be two new buttons, one blue with the word 'upload' and one grey with the word 'clear'.
3. If you are happy with the selected file, click upload. If you have selected the wrong file, click clear and start again from point 1.

THE ROLE OF AN APPROVER

A data approver is responsible for checking that the data submitted by the reporter is correct (sense-checking) and either approving or rejecting the report submitted. An approver will likely be responsible for approving multiple reporting packages and will have an understanding of sustainability data; therefore, they should be a sustainability professional within the project or working for the client company.

If an approver approves a report, the data then feeds into the main company's sustainability performance. If they reject the report, the reporter must then make the required changes, before the approver can then accept the report.

Getting setup

See reporting user section for guidance

Viewing submitted data

To view data for review:

1. Login to your account
2. Navigate to the correct reporting package you are reviewing using the left hand menu
3. Select the 'reports submitted' option from the 'Reporting package' option in the top menu.
4. Find the reporting period submission you are asked to review, and click the settings 'cog' at the end of that row.
5. From the settings menu option, select view.

Approving/Rejecting submitted data

To approve data:

Review the data using the process outlined above in ‘Viewing submitted data’.

The approver can then select 'accept' or 'reject' which is at the bottom of the report (the approver does not need to return to the reports due page, nor select the icon again)

The new functionality of the system enables approvers to approve/reject the entire report at once or to do it by section. See below: