

TRAINING SLIDES FOR REPORTERS AND APPROVERS



CONTENT



1. **Overview:** Purpose and Structure of the National Highways Social Value Tool



2. The Role of an **Admin**



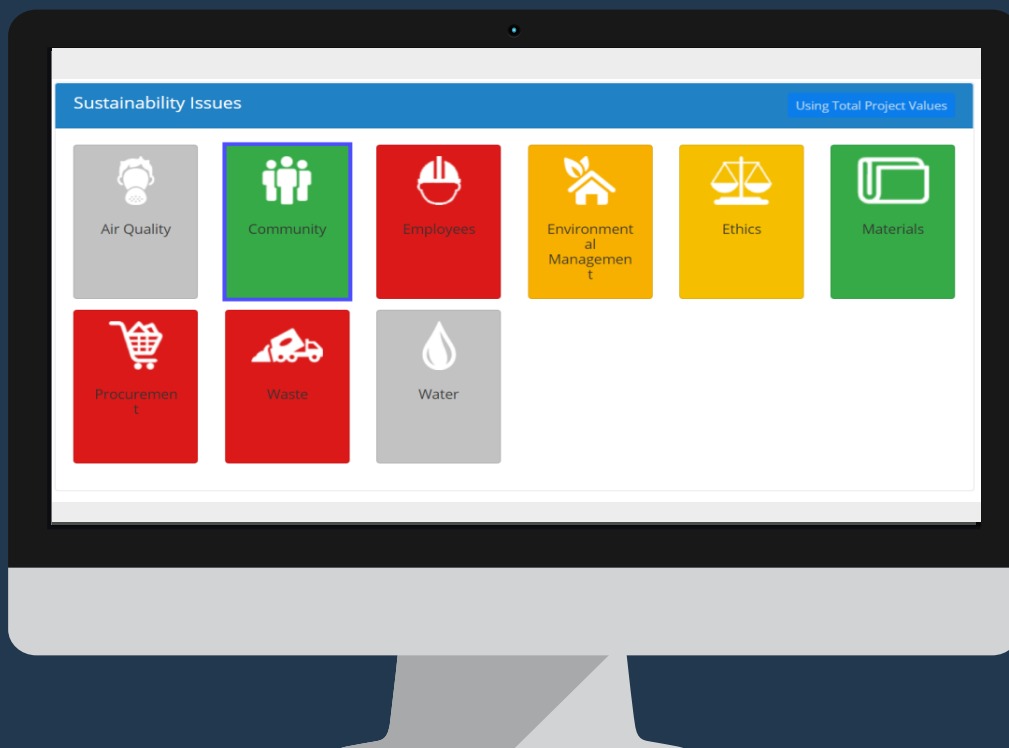
3. **Reporting and Approving**

LEARNING OUTCOMES

- Deep understanding of National Highways Social Value Tool
- Structure of Tool, including Reporting Units
- Various responsibilities of Tool Admins
- How to add/remove supplier organisations and users within your Reporting Unit
- Support Resources

1. An Overview of the National Highways Social Value Tool

A Social Value performance management
tool for the highways sector



Red Amber Green dashboards indicate project / supply chain performance against our **key social value issues**

NB: if no targets are set within the Tool, dashboards will be shown in neutral **Grey**.

MANAGING OUR SOCIAL VALUE IMPACT



Using the Tool we can monitor/report our Social Value impact across all our frameworks and major projects



The tool is cloud based and manages large data sets, moving away from excel spreadsheets

Our Social Value Tool is designed to...



OPTIMISE OUR SOCIAL VALUE STRATEGY

Measuring and understanding our performance will be crucial to delivering our social value strategy



MEASURE OUR SOCIAL VALUE IMPACT

Assess our project performance through a wide range of social value metrics and indicators



IDENTIFY HOTSPOTS FOR ACTION

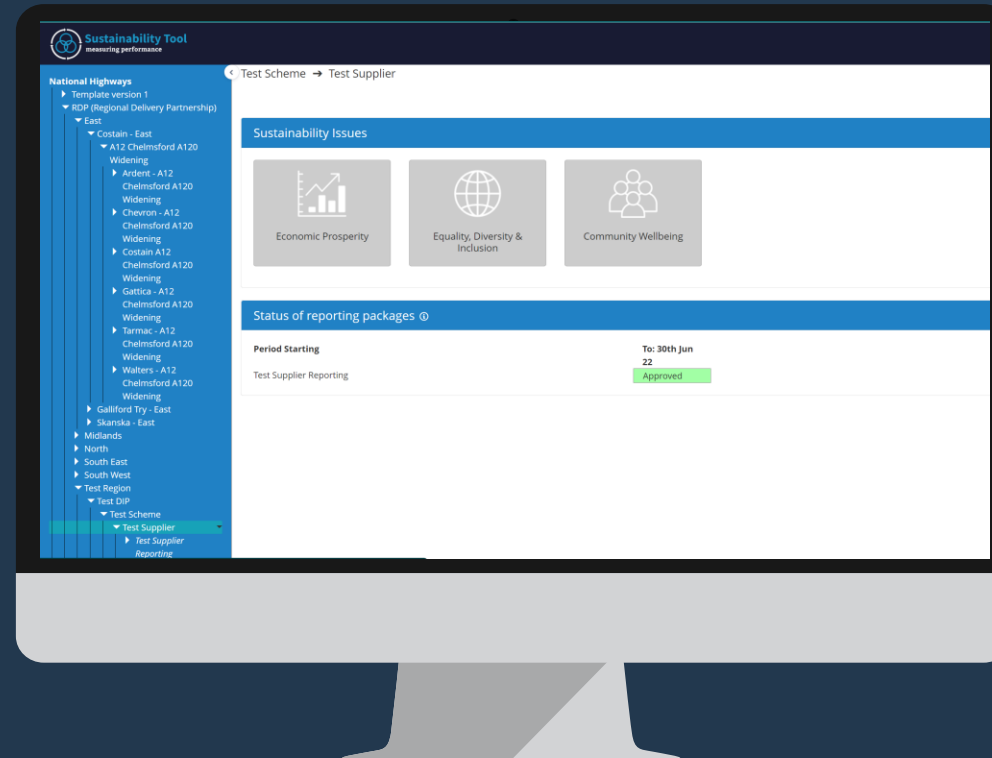
Understand the biggest social value risks and uncover potential areas for improvement

ISSUES WE REPORT ON

ECONOMIC
PROSPERITY

EDI

COMMUNITY
WELLBEING



REPORTING HIERARCHY



Corporate Dashboard

Dashboard to evaluate National Highways overall Social Value impact / performance

Reporting Unit Dashboards

Data is displayed in project / framework / staff department dashboards to monitor performance at this “Reporting Unit” level

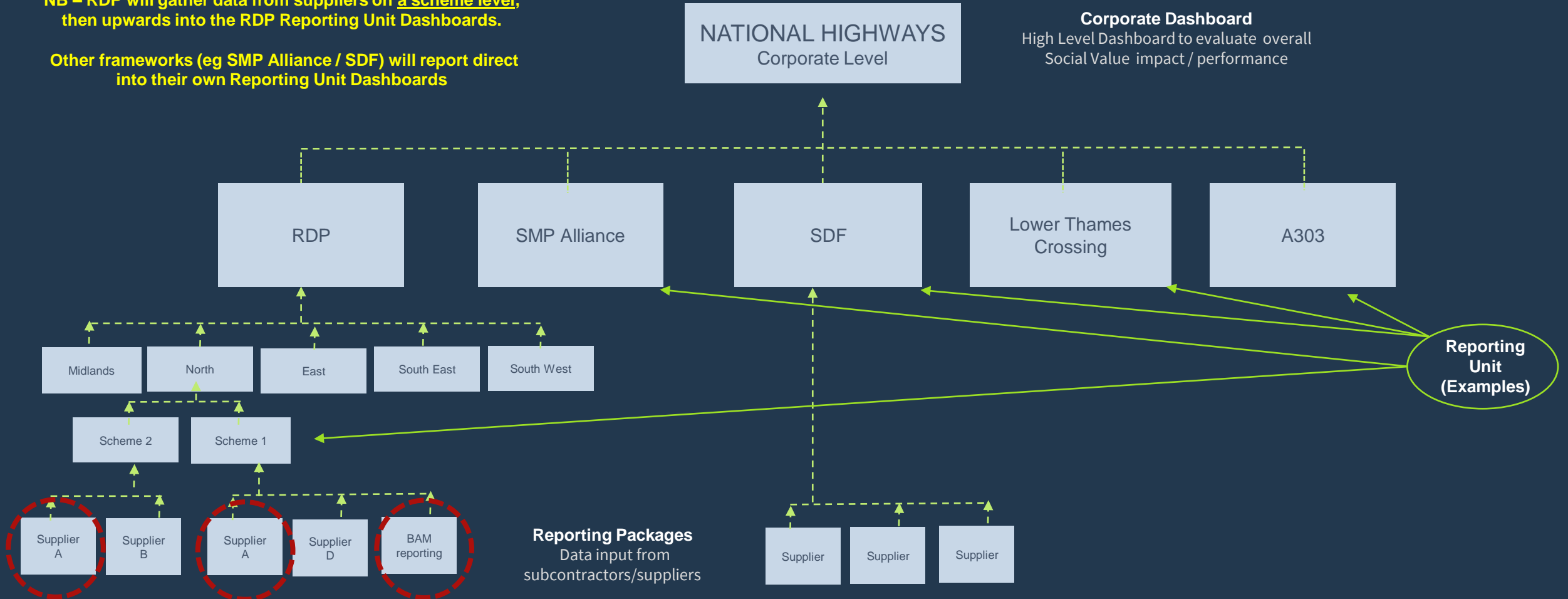
Reporting Packages

Data is inputted through one or multiple reporting packages within each Reporting Unit

ACCOUNT STRUCTURE

NB – RDP will gather data from suppliers on a scheme level, then upwards into the RDP Reporting Unit Dashboards.

Other frameworks (eg SMP Alliance / SDF) will report direct into their own Reporting Unit Dashboards



TOOL METRICS / INDICATORS

Social Value Issue	Indicator Name
Economic Prosperity	Number of full-time equivalent employment opportunities, within your direct employees, 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 under the contract (Voluntary organisations, Charities, Social Enterprises and mutuals)
	Total £ value of spend with diverse suppliers
	Number of local employees (full-time equivalent) on contract
	Number long-term unemployed (>12 months) (full-time equivalent), excluding Not in Employment Education or Training (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 and 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 employees who self-declared this, working on a scheme
	% of full time B.A.M.E employees working on a scheme
	Number of LGBTQ+ employees (full-time equivalent), 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 in place to improve the physical and mental health and wellbeing of employees
	Number of hours delivered to volunteering and community project initiatives

PROFILES & ROLES



REPORTER

- Enter data into the tool
- Modify submitted data



APPROVER

- Responsible for checking data submitted (approve or reject)



ADMIN

- Highest authority level
- Set up and manage Reporting Unit accounts
- Modify settings
- Navigate Dashboards



VIEWER

- See dashboards but no ability to edit or report

2. The Role of an Admin



GET TO KNOW YOUR ADMINISTRATOR!

Administrators play a key role in the successful implementation of the Social Value Tool. Here are your key activities:



Manage the Reporting Unit account

Admins have the highest authority level in the system. They can give access to other members of their organisation / supply chain, access data at all levels, run reports, etc



Main point of contact between their Reporting Unit and the supply chain / staff members.

Admins are in charge of any changes made to supplier accounts, this includes: adding/removing supplier organisations; adding/removing users in the system; changes to the configuration (e.g. reporting periods)



Manage the Supply Chain

Check accounts regularly especially around reporting deadlines to get an insight on their supply chain/ staff colleagues level of engagement. Have they submitted their reports? Do they provide enough information? What kind of support do they need? Feedback is key to the success of the tool

3. Reporting and Approving within the Social Value Tool



PROFILES & ROLES



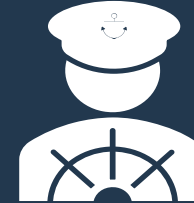
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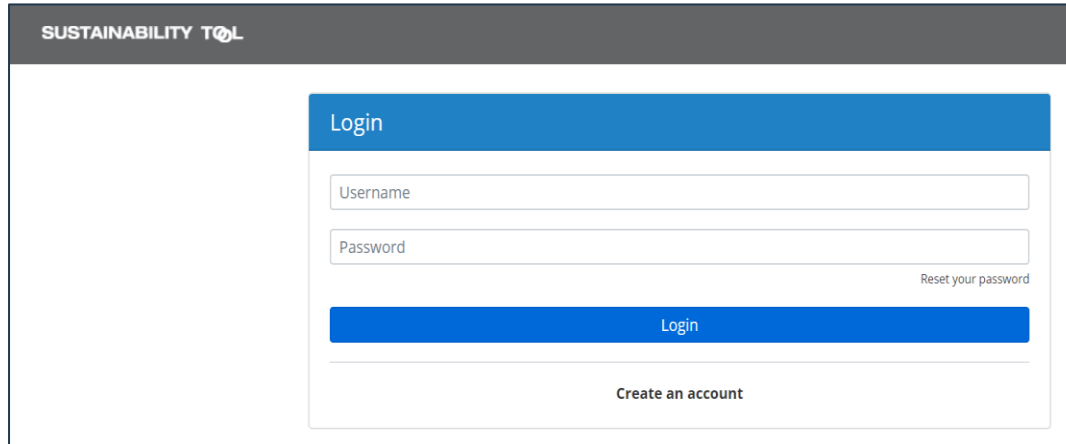


VIEWER

- See dashboards but no ability to edit or report

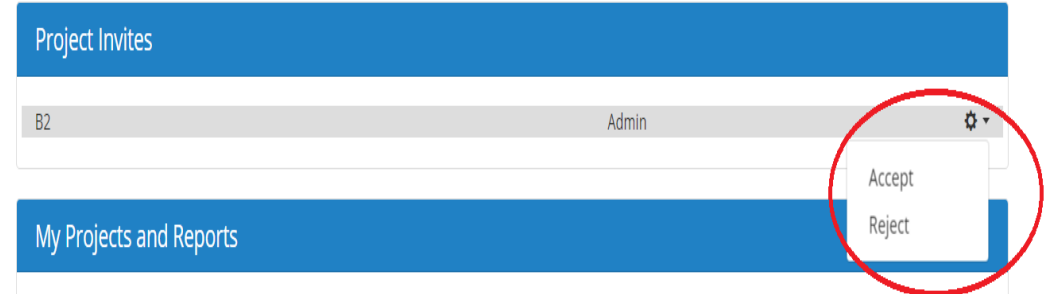
ACCOUNT SETUP

1) Follow the registration link



The screenshot shows the 'SUSTAINABILITY TOOL' header. Below it is a 'Login' section with a blue header. There are two input fields: 'Username' and 'Password'. A 'Login' button is below the password field. To the right of the password field is a link that says 'Reset your password'. At the bottom of the login section is a link that says 'Create an account'.

2) Accept the invitation to the project



The screenshot shows the 'Project Invites' section with a blue header. Below it is a table with two columns: 'B2' and 'Admin'. A red circle highlights a dropdown menu in the 'Admin' column, which contains the options 'Accept' and 'Reject'.

***** NOTE:** You will be added as an admin for your Supplier accounts, and you will receive individual notification emails for you to accept the invites

REPORTING

Test Scheme → Test Supplier → Test Supplier Reporting

Reporting period 1st Jul 22 to 30th Sep 22

[Export report metrics](#)

Economic Prosperity ▲

Equality, Diversity and Inclusion ▲

Community Wellbeing ▲

Metric	Units	Value	Comments	N/A
• Number of full-time equivalent employment opportunities, within your direct employees, supported under the contract* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of national Skills Academy for Construction roles (excluding apprenticeships)* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of weeks of apprenticeships (excluding National Skills Academy for Construction roles)* ⓘ	Weeks	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of apprenticeships completed (excluding National Skills Academy for Construction roles)* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of hours dedicated to educational/career engagement events (excluding work placements)* ⓘ	Hours	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of weeks of work placements* ⓘ	Weeks	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of hours of accredited training delivered* ⓘ	Hours	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of registered qualifications gained* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• £ value of contract opportunities awarded under the contract (start-ups and micro)* ⓘ	GBP (£)	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• £ value of contract opportunities awarded under the contract (Small and Medium Enterprises)* ⓘ	GBP (£)	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• £ value of contract opportunities awarded under the contract (Voluntary organisations, Charities, Social Enterprises and mutuals)* ⓘ	GBP (£)	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of local employees (full-time equivalent) on contract* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of long-term unemployed (>12 months) (full-time equivalent), excluding Not in Employment Education or Training (NEETs), working on a scheme* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of employees not in Employment Education or Training (full-time equivalent) working on a scheme* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
• Number of people 'other new to the industry' (full-time equivalent) working on a scheme* ⓘ	Number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

*****METRIC:** standard measurement to track performance – used to calculate indicators

Submit for Approval

- Quarterly reporting - Automatic email notifications when report is due or submitted
- Comments
- Document Upload
- Metric Frequency

APPROVING / REJECTING

Reporting Package ▾ Admin ▾ User ▾

← Reports Submitted

Heptonstall Conversions → Shoreditch Development → Main contractor

Supplier(s)	Reporting Period	Status	Last Updated	Last Update By	Comment	
Main contractor	1st Mar 21 to 31st Mar 21	Approved	20th May 20 - 01:38	admin@ods-track.com	The information is correct and approved	⚙️ ▾
Main contractor	1st Feb 21 to 28th Feb 21	Approved	3rd Apr 20 - 12:32	admin@ods-track.com	testing approved	View Show History Approve Reject
Main contractor	1st Jan 21 to 31st Jan 21	Approved	3rd Apr 20 - 12:33	admin@ods-track.com	approved	
Main contractor	1st Dec 20 to 31st Dec 20	Approved	3rd Apr 20 - 12:24	admin@ods-track.com	testing approved	
Main contractor	1st Nov 20 to 30th Nov 20	Approved	26th Mar 20 - 10:25	Charles Naud	approving	
Main contractor	1st Oct 20 to 31st Oct 20	Requires Revision	26th Mar 20 - 10:25	Charles Naud	reject	
Main contractor	1st Sep 20 to 30th Sep 20	Requires Revision	26th Mar 20 - 10:25	Charles Naud	rejecting	⚙️ ▾
Main contractor	1st Aug 20 to 31st Aug 20	Approved	10th Jun 20 - 01:34	admin@ods-track.com	Approving to test if it works	⚙️ ▾
Main contractor	1st Jul 20 to 31st Jul 20	Pending Approval	9th Jun 20 - 01:56	Stefania Chica-Jacome	This is incorrect	⚙️ ▾
Main contractor	1st Jun 20 to 30th Jun 20	Pending Approval	9th Mar 20 - 11:15	admin@ods-track.com	5	⚙️ ▾
Main contractor	1st May 20 to 31st May 20	Requires Revision	29th May 20 - 11:07	admin@ods-track.com	you haven't reported much, what's up?	⚙️ ▾
Main contractor	1st Apr 20 to 30th Apr 20	Approved	20th Feb 20 - 09:40	admin@ods-track.com	missing data but approved for time being	⚙️ ▾
Main contractor	1st Mar 20 to 31st Mar 20	Approved	3rd Apr 20 - 12:52	admin@ods-track.com	approved	⚙️ ▾
Carbon consultant	1st Feb 20 to 29th Feb 20	Approved	13th Feb 20 - 08:25	admin@ods-track.com	great, thank you	⚙️ ▾

STATUS:

- Pending Approval: report has been submitted and requires approval
- Approved: report has been approved by the approver
- Requires Revision: report has been rejected and requires amendment

* Approvers receive a notification when a report is submitted

APPROVING / REJECTING

- Excavation waste Re-used ⓘ tonnes
- Excavation waste Recycled ⓘ tonnes
- Excavation waste Recovered (waste to energy) ⓘ tonnes
- Excavation waste Composted ⓘ tonnes

Changing status to **APPROVE** for reporting period **Dec 1st 18 to Dec 31st 18**. Please provide a comment.

Approved

Close

Submit

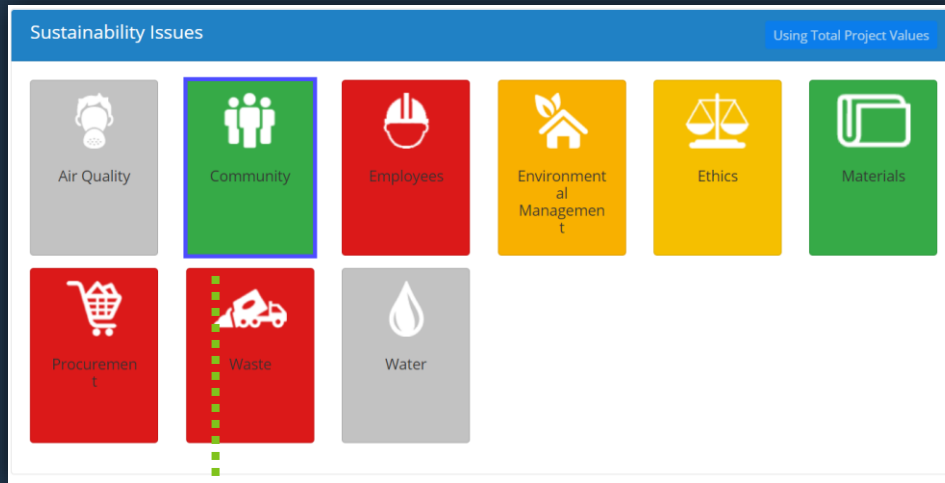
Report an error, submit a question or provide feedback

- Comments
- View Report
- Show history

Status and comment history for report: 1st Dec 18 to 31st Dec 18			
Updated By	Update Time	To Status	Comment
admin@ods-track.com	9th Sep 19 - 12:03	Approved	Approved

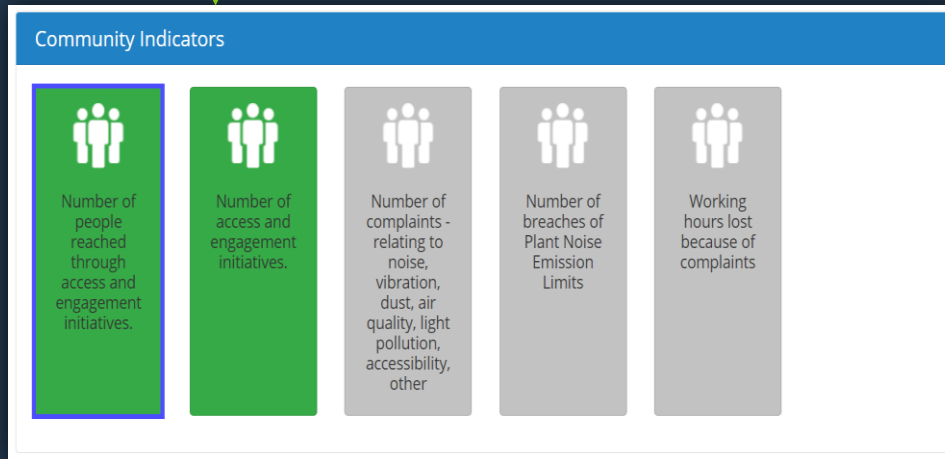
NAVIGATING DASHBOARDS

Social Value areas that are material to the project

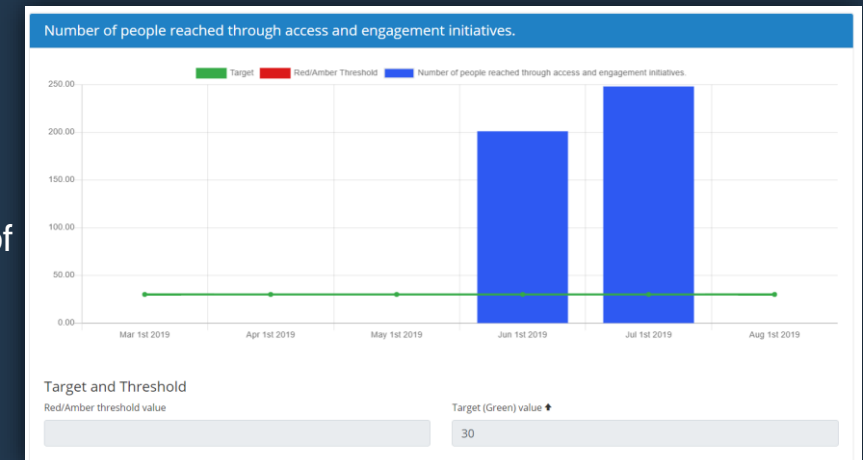


- ✓ Targets and thresholds
- ✓ Cumulative Graphs
- ✓ Cumulative Tables

Indicates progress against an area



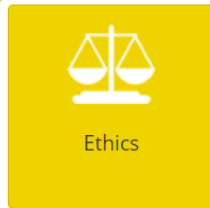
Graphic performance of indicators



TIPS FOR NAVIGATING DASHBOARDS

1

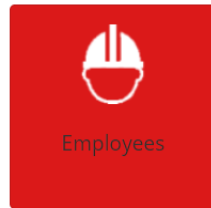
UNDERSTAND THE COLOUR



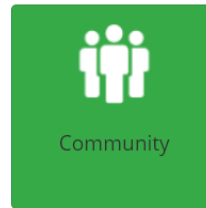
Ethics



Environmental
Management



Employees



Community

- **GREEN:** target has been achieved.
- **AMBER:** threshold has been achieved but not target. **AREA FOR IMPROVEMENT**
- **RED:** target and threshold have not been achieved. **TAKE ACTION TO IMPROVE PERFORMANCE**
- **GREY:** no target has been set

2

FOLLOW THE COLOUR



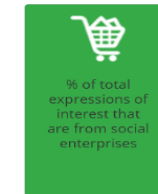
% Supply Chain
School
members



% of suppliers
& sub-
contractors, by
number, that
are small
medium
enterprises



% of suppliers
by number that
are BAME



% of total
expressions of
interest that
are from social
enterprises

- **GOOD NEWS** stories: follow green tiles at an issue level and then green tiles within those
- **AREAS FOR IMPROVEMENT:** follow red/amber tiles

3

UNDERSTAND PERFORMANCE BREAKDOWN

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

- **CELLS WITH NUMBERS:** show data reported against metrics that make up the indicator
- **CELLS WITH COLOUR:** show indicator performance of the corresponding project
- **EMPTY and GREY CELLS:** not enough data has been reported