LOOP USER GUIDE

V1.2

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Contents

1. Overview

Our live reporting software helps you clearly understand and reliably evidence the value for money and Social Value you are creating. It is simple to use, supports all the recognised standards including: The National TOMs Framework, United Nations Sustainable Development Goals (SDGs), The 4 Capitals and the Government's Social Value Model (PPN06/20).

It is validated by SVUK qualified practitioners, accredited by Pagabo, and aligned to The HM Treasury Green Book, The Construction Playbook and

Procure for Value principles. We are partnered with Social Value UK and International and our software is one of the UK's leading social value calculators. We are also approved UK government G-Cloud suppliers.

1.1 Purpose of this document

The purpose of this document is to provide support to users of Loop's 'Social Value Calculator' and to explain all functionality of the software. The guide will direct the user through the different processes with a comprehensive step-by-step guide.

An Overview, Glossary of Terms and 2.2 Frequently Asked Questions(FAQ) section have also been included to help with understanding terms and any common issues surrounding the use of the software.

2. Support

The next few sections of the user guidance for Loop's Social Value Software outlines the support channels available, as well as some Frequently Asked Questions (FAQs).

2.1 Support contacts

If you have any technical issues or queries surrounding the functionality of the software then firstly read Section 2.2 Frequently Asked Questions. If you don't find the answer you are looking for then please email Support@loop.org.uk or call 01482 765 208 between the hours of 09:00am – 17:00pm.

2.2 Frequently Asked Questions

If you are having issues using the software, please see below for a list of Frequently Asked Questions with answers.

- I have forgotten my password how can I reset it?
    - On the main log in page under the fields for entering your credentials there is a button that states 'Forgotten Password?'. Once you click this a pop up will appear for you to enter you email and send a link through which will allow you to reset your password. Please see section '6.3 Updating password. for step-by-step instructions with visual indicators to support.
- How do I update my password once I've logged in?
    - Once you have logged into the system you can update your password in two ways. Click on your name in the top right corner of the window and you will be redirected to your account details where you can update your password and contact details. Please refer to section 6.3 Updating password.' for step-by-step instructions with visual indicators to support.
- What 'Activity Details' can you amend once an activity has been created?
    - **Forecast stage:** You can amend all project details on a forecast project this includes Project Name, Spend/Turnover,

Project Description, Start & End date, Sector & Industry, Region, Sub-region & Local Authority.

  - **<u>Monitor stage:</u>** For a monitoring project you can amend all project details as you can with a forecast project other than the end date as this is a live project and will affect the calculations from data entered already if you amend the end date so this is not possible. If you need to amend the end date you will need to go back to your forecast project and amend the end date then move the project through to Monitor again.

  - **<u>Evaluate stage:</u>** For an evaluation project, you can amend all project details other than the start or end date. With the evaluation stage you are evaluating a project/activity that has already been completed/finished. So once the project has been saved you are unable to amend the start or end date.

- What are Impact Metrics?

  - Impact measures are applied to ensure that the financial proxy values attached to specific outcomes (associated with delivering KPIs) are not overclaimed or double counted. There are four key impact measures Loop applies to values when calculating SROI against different types of activity.

- What is a Supply Chain User?

  - A supply chain user is a user you can invite into a specific projects that is outside of your organisation, they are able to add metrics & data to a project but they are unable to edit any project details. They will not have access to any dashboards or reports and will not be able to access any projects you don't invite them too.

- How many Supply Chain Users can you add to a project ?

  - There is no limit on the number of supply chain users you can add to any project.

- Can a Supply Chain User be added to more than one project?

    - You can assign a Supply Chain User to any number of projects, there is no limit.

- What data can Supply Chain Users access/edit in my organisation?

    - Supply Chain Users can only see activities that you have assigned them to. They won't be able to access any dashboards or reports, they won't be able to edit any activity details other than adding metrics and adding data against metrics.

- Do Supply Chain Users count as one of our users as part of our license?

    - Supply Chain Users do not count to your total number of users under your license agreement, you can add any number of Supply Chain Users to any number of project.

- Where can I see a full list of Local Authorities so that I get the correct one for a project?

    - https://www.ons.gov.uk/methodology/geography/ukgeographies/eurostat

- Do you need a activity value/spend when creating a project?

    - Yes, this is a mandatory field and allows the software to calculate the Return on Investment.

- Where can I find the definition for each metric in the system?

    - When you add a metric to an activity the definition will appear within the metric pop up. Please refer to section 8.2 Metric Details for a screenshot of what this looks like
    - You can also find a description for each metric in the National Social Value Standard list of metrics. You can find the link to download this in section 16.2 National Social Value Standard – Full list of metrics

- How do I add a user account to my organisation?

    - You will need to get in touch with us at Loop via the support email: Support@loop.org.uk. We require the name and email address of the people you wish to add to the system.

- How do you calculate the monetary values for the metrics within the system?
    - We use the National Social Value Standard (SVS) for our metrics and methodology within the tool. Please refer to the section 4. Methodology – National Social Value Standard (SVS). For a brief overview of the methodology used for the software. Alternatively, for a more in-depth guide to the SVS please visit : https://loop.org.uk/national-social-value-standard/

3. Glossary of Terms

Below is a glossary of terms around some of the key terminology used with the platform giving a clear definition of each term and its use.

Term	**Definition**
Attribution	Taking into account the impact other organisations or stakeholders could have had in contributing to the social value generated
Beneficiaries	A beneficiary is any person who gains an advantage and/or profits from a project / activity.
Care leaver	Care leavers are young people aged 16 to 25 leaving authority care.
Deadweight	Allowing for outcomes that would have taken place without the intervention, comparing with business as usual (BAU) or the 'do nothing' scenario
Double counting	Counting of the value more than once is called double-counting. The problem with double counting is it leads to an overestimation of the value of goods and services produced

Economic benefits	Benefits that can be quantified in terms of money generated, such as net income, revenues, etc.
Economic Impact	Impacts on public spending or economic output and productivity
Environmental Impacts	Refers to impacts that relate to the environment, such as the level of carbon emissions or biodiversity impacts.
Evaluation	The last stage in the software after forecasting and monitoring that involves analysing all the data/information for a final summary.
Financial proxy	A financial proxy is a monetary representation of the value of an outcome
Forecast	The first phase of an activity before it has gone live. The forecast activity is a way to set commitments/targets for what your activity hopes to achieve and estimate the Social Value this would create.
Impact map	a table that captures how an activity makes a difference: that is, how it uses its resources to provide activities that then lead to particular outcomes for different stakeholders
Indicator	Indicators are measures that provide information on how much of an outcome is expected to happen or has happened. They can be based on information provided by those experiencing the outcome or from other sources
Indirect employment	Employed indirectly through the reporting organisation's supply chain and sub-contractors. The reporting organisation needs to be directly responsible for these employment impacts. Information asymmetry - a difference in the information available to the parties involved in a transaction giving an advantage to one side over the other
Metrics	A measurement of value, which can be monetised or non-monetized. An

	alternative way of describing metrics could be indicator.
Monetised metrics	Monetising social value is the process of attaching a proxy financial value to an outcome. That value represents the relative importance of that change to those impacted. It does not show an actual financial return.
Monitoring	The Live monitoring phase of a project. Once the project has begun. A place to track progress and document Impacts to reach targets set. E.g., How many jobs were created, Hours of training completed.
National Social Value Standard (SVS)	A measurement framework for the appraisal of social value – at the forecasting, monitoring, and evaluation stages. Developed by social value economists using the latest government and academic best practice, such as the HM Treasury Green Book. A full guide on the SVS can we found on its website – www.nationalsvs.co.uk.
Non-monetised metrics	Metrics which are quantified but do not have a monetary value attached to them. For instance, the percentage of people from under-represented groups employed in the workforce
Outputs	What we produce. Outputs are the tangible products as a result of the activities. They are usually expressed as nouns, are tangible and can be counted (e.g., 15 trainings, 5 market entry activities).
Proxy	an approximation of value where an exact measure is impossible to obtain
Social Impacts	These are impacts on individual or community wellbeing. For example, the change in mental health to an individual after moving from unemployment to employment
Social Value Model (PPN06/20)	The Social Value Model sets out the Government's social value priorities for procurement. It was launched following the publication of

	PPN/06/20, which sets out how social value should be taken into account for all major central government procurement.
Stakeholders	The type of person or group (stakeholder) benefiting from the activity or intervention.
The Four Capitals	The Four Capitals framework represents a different way to categorise Social Value impacts. The Four Capitals are: Financial/Physical, Social, Human & Natural Capital. The Four Capitals aim "to drive decision-making and deliver measurable value improvement".
The National TOMs Frameworks	The National TOMs framework stands for Themes, Outcomes and Measures and "*aims to provide a minimum reporting standard to help buyers measure and justify the pursuit of social value outcomes in their contracts*".
United Nation's Sustainable Development Goals (SDGs)	The United Nation's SDGs are a collection of seventeen interlinked global goals designed to be a "*blueprint to achieve a better and more sustainable future for all*".
VSCE	Is the collective term that includes any organisation working with a social purpose and is often interchangeable with the terms 'third sector' or 'civil society organisations VSCE - is the collective term that includes any organisation working with a social purpose and is often interchangeable with the terms 'third sector' or 'civil society organisations.

4. Methodology – National Social Value Standard (SVS)

The National Social Value Standard (SVS) is the main measurement framework used within our social value software. It provides a broad, robust and accessible measurement framework to help drive greater social value, in the right way.

It includes over 1300 metrics, 90% of which are monetised. The metrics are backed and researched by qualified and experienced economists, our metrics cover everything ranging from social, environmental, and economic.

The metrics are further split into 6 key groups, these are:

1. 'Employment and Economic'
2. 'Health, training, and skills'
3. 'Supply Chain'
4. 'Community'
5. 'Environmental.'
6. 'Other'

Outcomes focused and regularly updated metrics developed by social value economists, with additionality analysis conducted against every value to mitigate overclaiming.

The SVS follows government guidance such as the HM Treasury Green Book, uses the latest academic literature, and maps to key frameworks such as the government's Social Value Model and the UN Sustainable Development goals.

For a more detailed breakdown and guide to the National Social Value Standard (SVS) please visit: https://loop.org.uk/national-social-value-standard/

5. Prerequisites

The following prerequisites must be met for you to be able to log into Loop.

You must have been through a full training session explaining Social Value and how to use the tool correctly with our system trainer.

You must have been onboarded and sent your log in credentials via email from Loop.

If you haven't received your login details, please check your junk folder in your emails. If you still have not received the email. Please get in touch with us either through the email support@loop.org.uk or call 01482 765 208.

6. Administration

This section of the guide covers a number of administrative topics such as how to add users to the system, how to access the tool, how to update your password and what to do if you've forgotten you password with step by step guidance on each topic.

6.1 Adding Users to the system.

To add users to the software, please contact Support@loop.org.uk with the full name, email address and job title of the people you want adding as users to the system. Our support team will then onboard the requested users onto the system and they will receive an email to set up their password for their account.

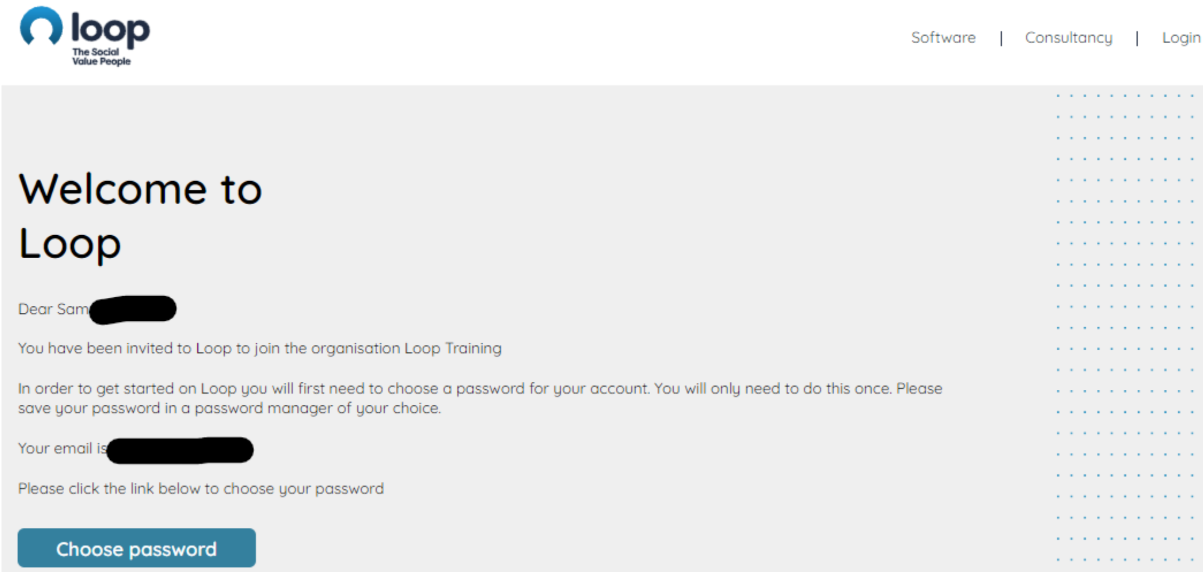
If you don't receive an email please check your junk folder just to make sure it's not in there, if you still haven't received an email, again please email support@loop.org.uk with your query and we will investigate and rectify the issue.

6.2 Accessing the tool / Logging In

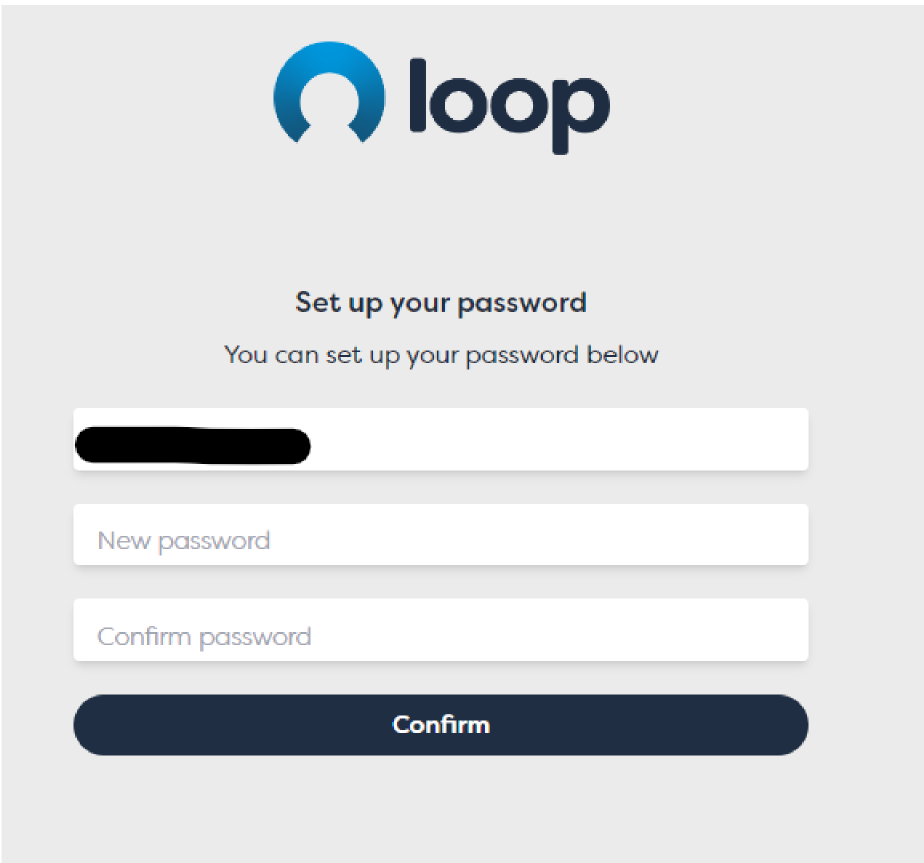
To gain access to Loop enter: https://app.loop.org.uk into your preferred browser or alternatively click the link provided above.

You will need to have set your password up previously via an email sent through to you from the team at Loop. If you have not done this yet please follow the next steps.

Once you've had your training on the platform with our system trainer or if you are new to the platform and have requested a log in from Loop (Section 5. Prerequisites) you will receive an email to set up your password as shown in the image below. The email address has been blocked out in this image for data security.

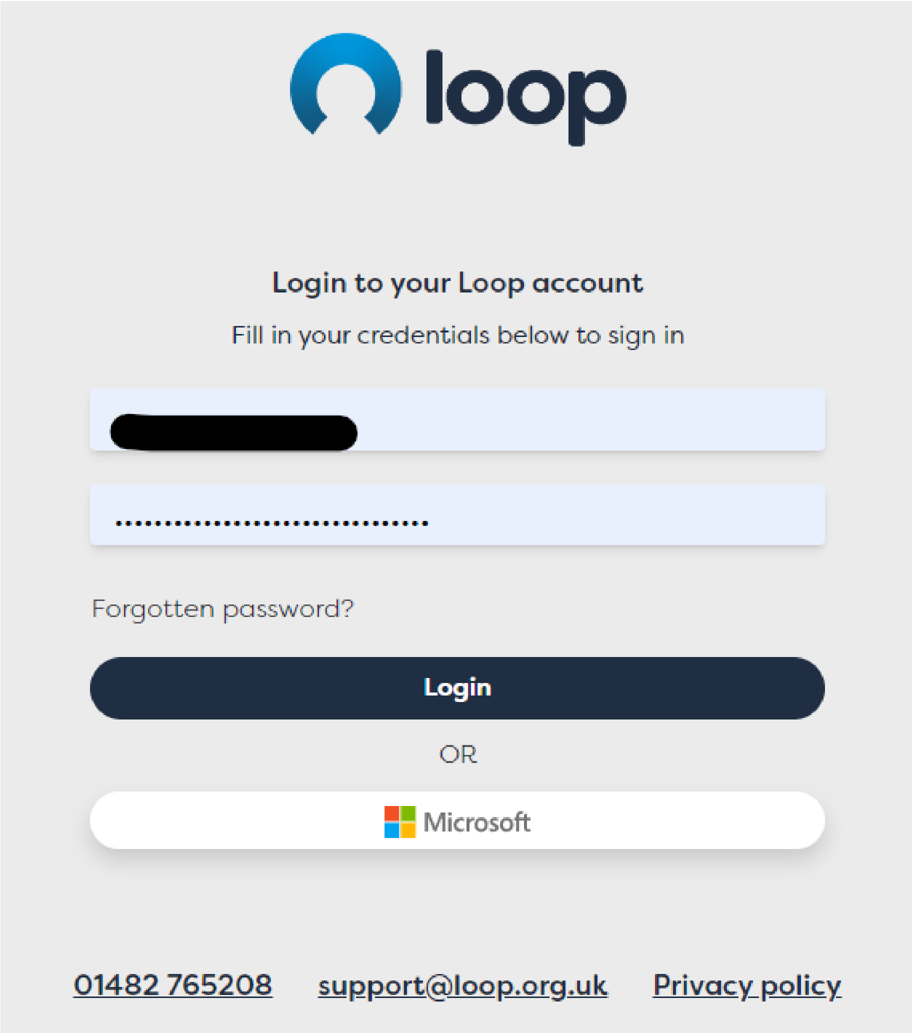


Simply click the ‘Choose password’ button and you will be redirected to the platform to set up your password as shown in the image below. The email address has been blocked out in this image for data security.



You will then need to enter your password in the ‘New password’ and ‘Confirm password’ fields. Your password must meet the following criteria a minimum of 8 characters with 1 capital, 1 number and 1 special char (!£$%&*@#). Once you’ve done this click ‘Confirm’ and you will receive a confirmation message across the top of your screen and you will be able to click to login as shown in the image below.

Once you've clicked log in, you will be redirected to the main login page where you can enter your credentials and log into the platform as shown below.



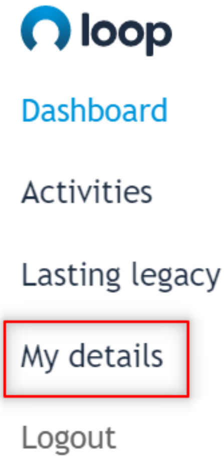
Once you log onto the platform you will be redirected to the Main Dashboard, please refer to 11.1 Main dashboard overview for a breakdown of this dashboard.

6.3 Updating password.

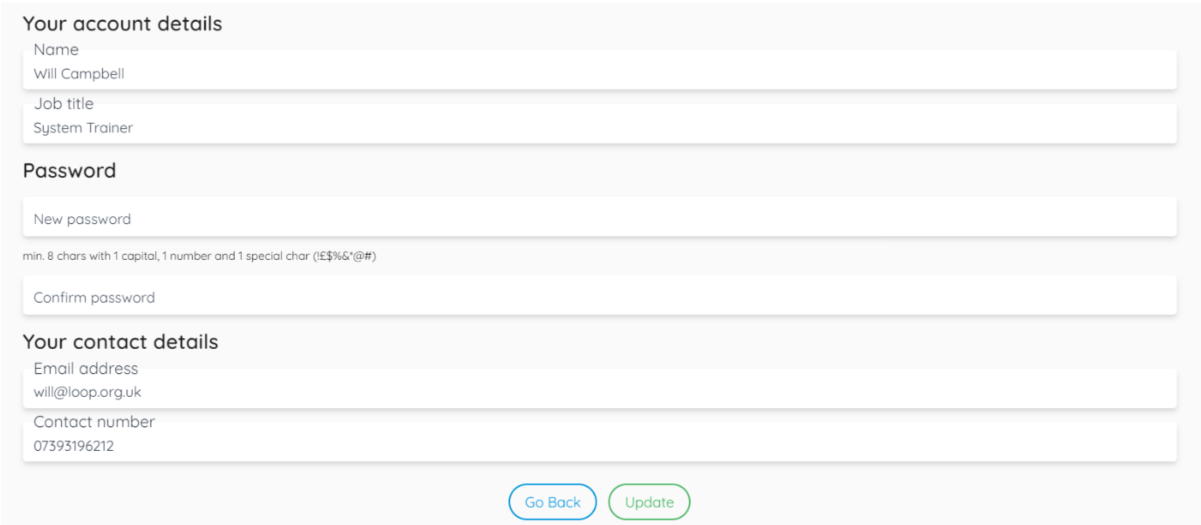
To update your password, the first step is to navigate to the 'My Details' tab on the main tool bar.

To access the main tool bar, in the top left corner of the screen there are four blue lines as shown in the image below, highlighted red with an arrow.

Once you click on these lines, the main tool bar will appear from the left-hand side of the screen. The image below shows what the main tool bar looks like and the 'My Details' tab has been highlighted in red.



Then click on 'My Details' and you will be redirected to your account details page as shown below.

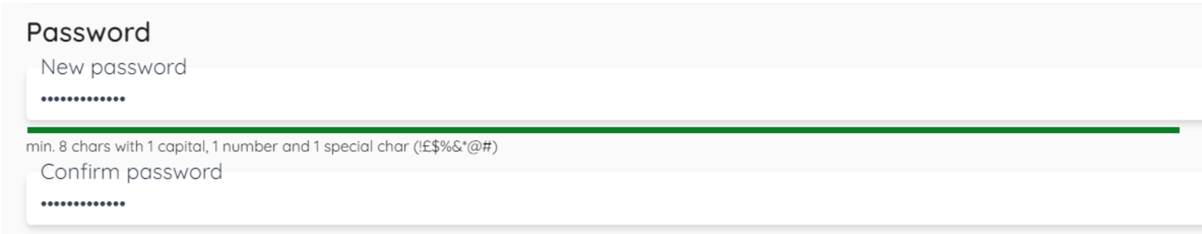


You can then change your password using the two fields under 'Password' to update your password as seen highlighted in red below.

Firstly enter your new password in the first field labelled 'New password'. Then confirm your new password in the second field labelled 'Confirm password' .

Your password must be a minimum of 8 charcaters with 1 capital, 1 number and 1 special character (!£$%&*@#).

The system will show if you if you haven't met the criteria and will also show in yellow or green how strong your password is, as shown in the image below.



Once you've met this criteria, scroll to the bottom of the screen and click the 'Update' button as highlighted in red below to update your password.

Once you've clicked update and you've met all the criteria, you will receive a confirmation message across the top of your screen to advise 'The information has been updated with success' as shown in the image below.

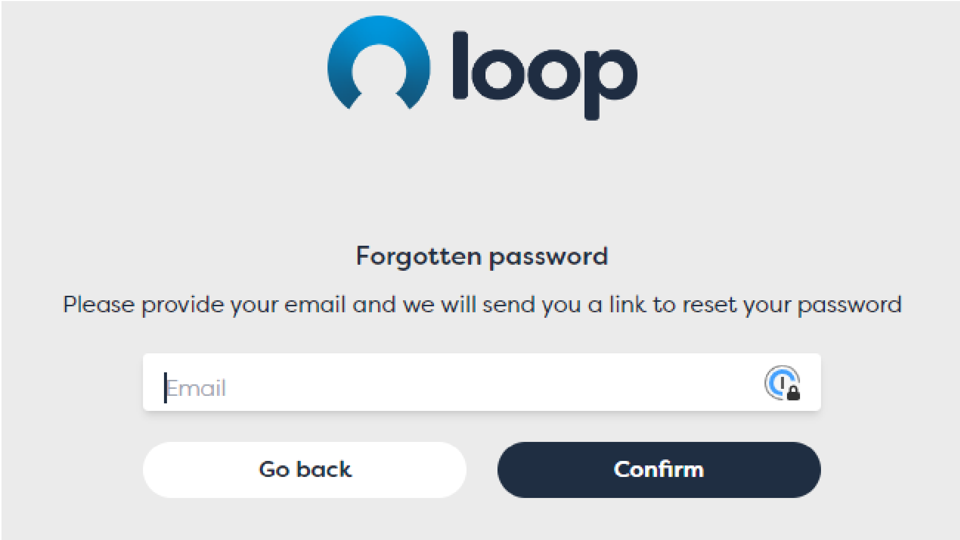
Your new password will now be updated for the next time you log in.

6.4 Forgotten Password

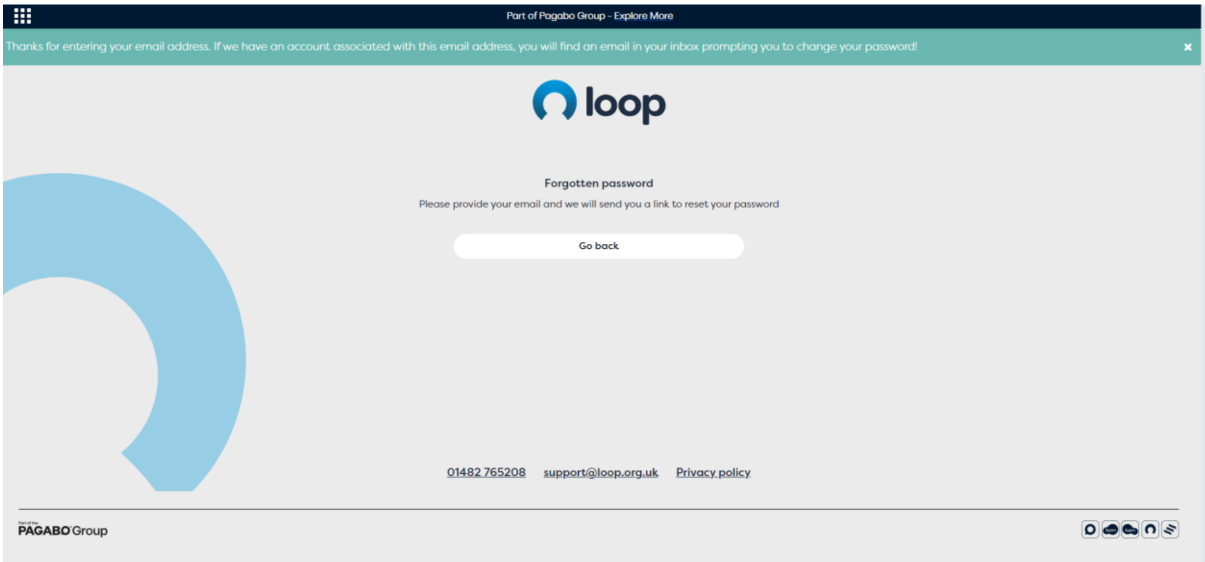
If you have ever forgotten your password and you are unable to log into the system, you can use the 'Forgotten Password' function to send an email through to yourself which will allow you to reset your password.

On the Main login page under the fields for entering your credentials, there is a button labelled 'Forgotten Password' as shown in the image below.

Once you've clicked the 'Forgotten password?' button, a pop will appear stating ' Please provide your email and we will send you a link to reset your password. As shown in the image below.



Simply enter your email address and click confirm. A reset link will then be sent to your email address and a confirmation message will appear on screen as shown below.



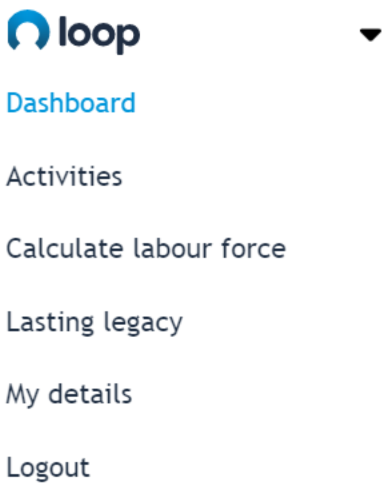
Your user account and password are specific to you. Do not share your account and password with others and avoid reusing passwords from other systems. We recommend changing your password the first time you log into the software from the temporary one sent to you via email.

7. Main Tool Bar Overview

This section explains how to access the main tool bar within the system so you can navigate the platform correct and make use of all the functionality within Loop.

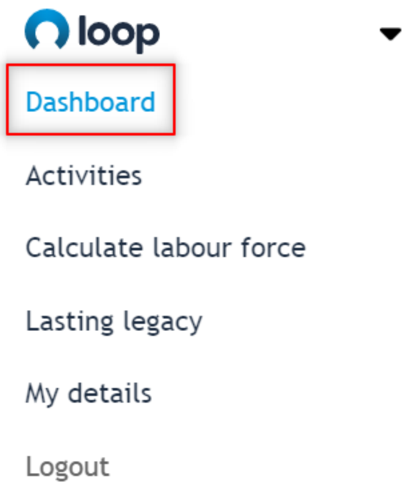
To access the main tool bar, in the top left corner of the screen there are 4 blue lines as shown in the image below, highlighted red with an arrow.

Once you click on these lines, the main tool bar will appear from the left-hand side of the screen. The image below shows what the main tool bar looks like.



7.1 Dashboard

The dashboard tab is the first tab on the main tool bar allows you to access a main overview dashboard for each stage of all the saved activities within your organisation giving you a high-level view of your Organisations Social Value. In the image below we have highlighted in red the dashboard tab.

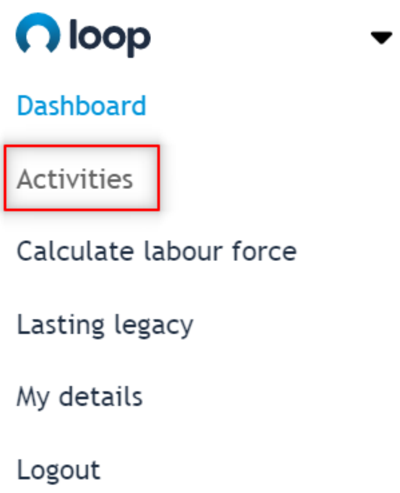


You will then be redirected to your main overview dashboard. Please refer to section 11.1 Main dashboard overview for a breakdown and explanation of what is displayed on the Main dashboard.

7.2 Activities

The 'Activities' tab is the second tab on the main tool bar across and allows you to access several different areas relating to your organisation's activities.

The image below shows what the main tool bar looks like, with the activities tab highlighted in red.



Once you click ‘Activities’ you will get a drop down with several options as shown here with red arrows next to each activities tab option.

To create an activity in the system, from the drop down under ‘Activities’ click the ‘Create activity’ option and you will be redirected , please refer to sections 8 through 10 for step by step instructions on how to create an activity at each stage. A full explanation of each stage of an activity is covered in Section 3 'Glossary of Terms'..

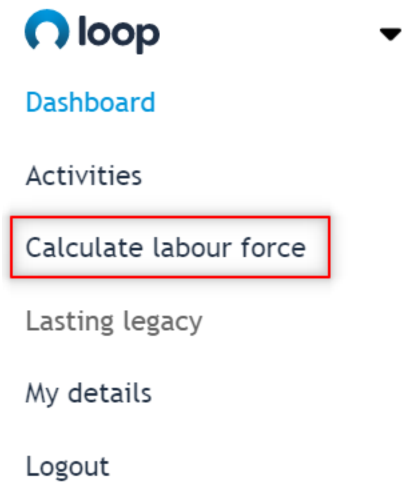
You can access all your ongoing activities through 'My activities', please refer to section 12. My Activities Overview for step-by-step instructions on how to do this and the different functions available under this area.

You can also access all your archived activities through 'Archived activities', please refer to section 13. Archived Activities Overview for step-by-step instructions on how to do this and the different functions available under this area.

7.3 Calculate Labour Force

The next tab on the main tool bar is the 'Calculate Labour Force' which allows you to estimate the amount of Labour Force needed on construction projects using information regarding the project entered during the activity details. It will take the length of activity, spend and location of the project you enter under the activity details and give you an estimated idea of the number of jobs, apprentices and work placements that would be needed for the project. It will also give you an estimate of how much should be spent in the local area.

The image below highlighted in red shows you which tab to click on to access the Labour Force Calculator.



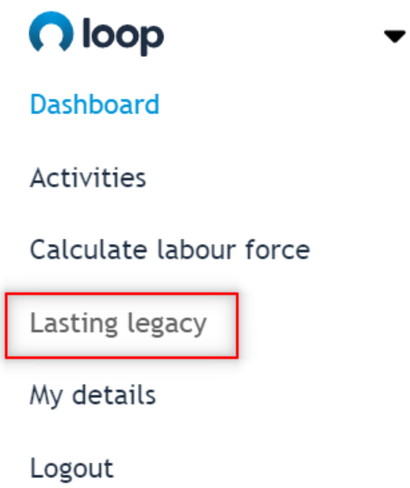
Once you click this tab you will be redirected to the labour force calculator to begin entering your activity details.

Please refer to section 14. Calculate Labour Force for full step by step instructions on how to do this.

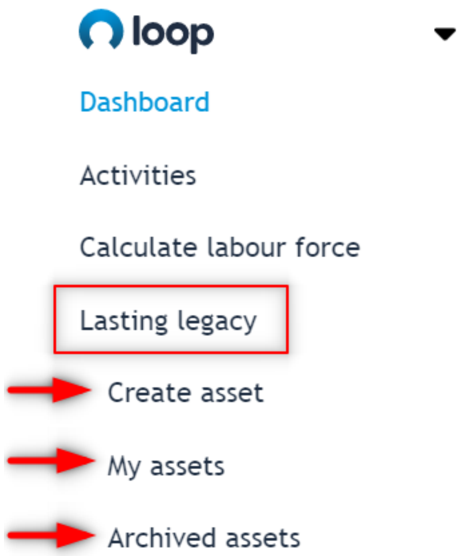
7.4 Lasting Legacy

The 'Lasting Legacy' section is the next tab on the main tool bar and allows you to document and track the 'Lasting Legacy' of your assets.

The image below shows what the main tool bar looks like, with the Lasting Legacy tab highlighted in red.



Once you click ‘Lasting Legacy’ you will get a drop down with several options as shown here with red arrows next to each option.



To create an asset in the system, from the drop down under ‘Lasting Legacy’ click the ‘Create asset’ option and you will be redirected , please refer to section 15.1 Creating an Asset for step by step instructions on how to create an asset.

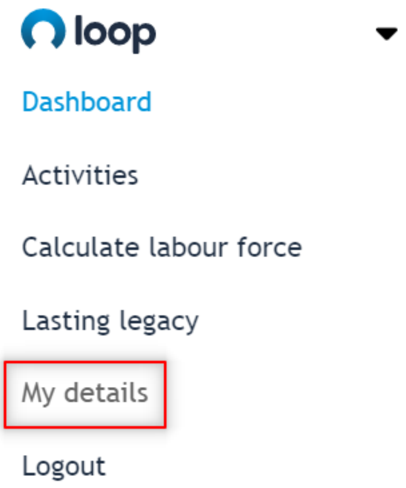
You can also access all your assets through ‘My Assets’, please refer to section 15.2 My Assets for step-by-step instructions on how to do this and the different functions available under this area.

You can also access all your archived assets through ‘Archived Assets’, please refer to section 15.4 Archived Assets for the different functions available under this area.

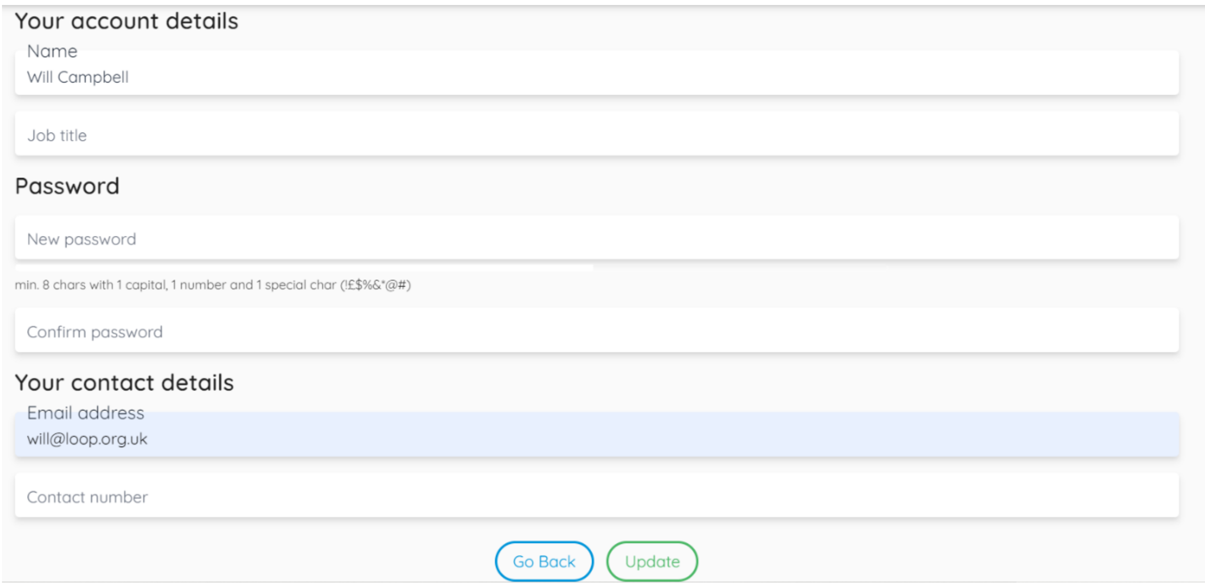
7.5 My Details

The Second to last tab on the main tool bar is the ‘My Details’ Page and allows you to access and edit your account details.

The image below shows what the main tool bar looks like with the ‘My Details’ tab highlighted in red.

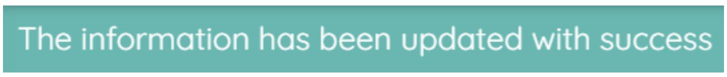


Once you click ‘My Details’ you will be redirected to your account details as you can see in the image below.



From here you can amend all your details such as your name, job title, email address and contact number. From here you can also update your password (for instructions on how to do this refer to section 6.3 Updating password. Once any information has been changed click the green ‘Update’ button at the bottom of the screen to confirm any changes.

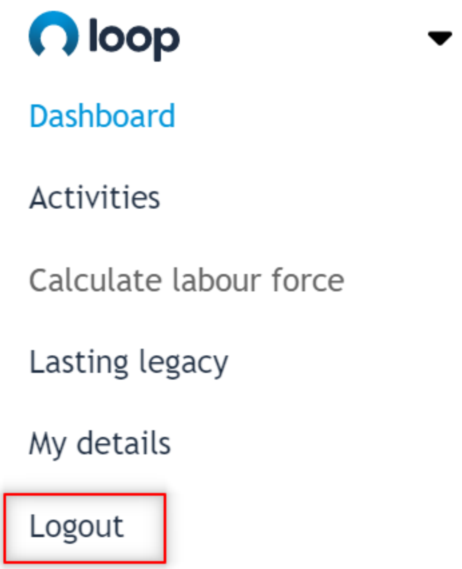
You will then receive the following confirmation message to advise you that your data has been updated successfully.



7.6 Log Out

The final tab on the main tool bar is 'Log out' this can simply be used to log out of the tool once you are finished entering data etc.

The image below highlights the logout tab in red.



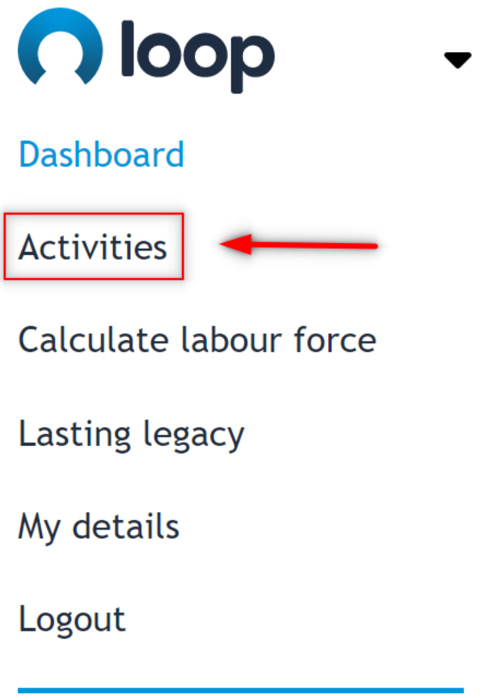
Once clicked, this will return you to the main log in page where you can enter your log in credentials to log back in.

8. How to create an Activity – Forecast

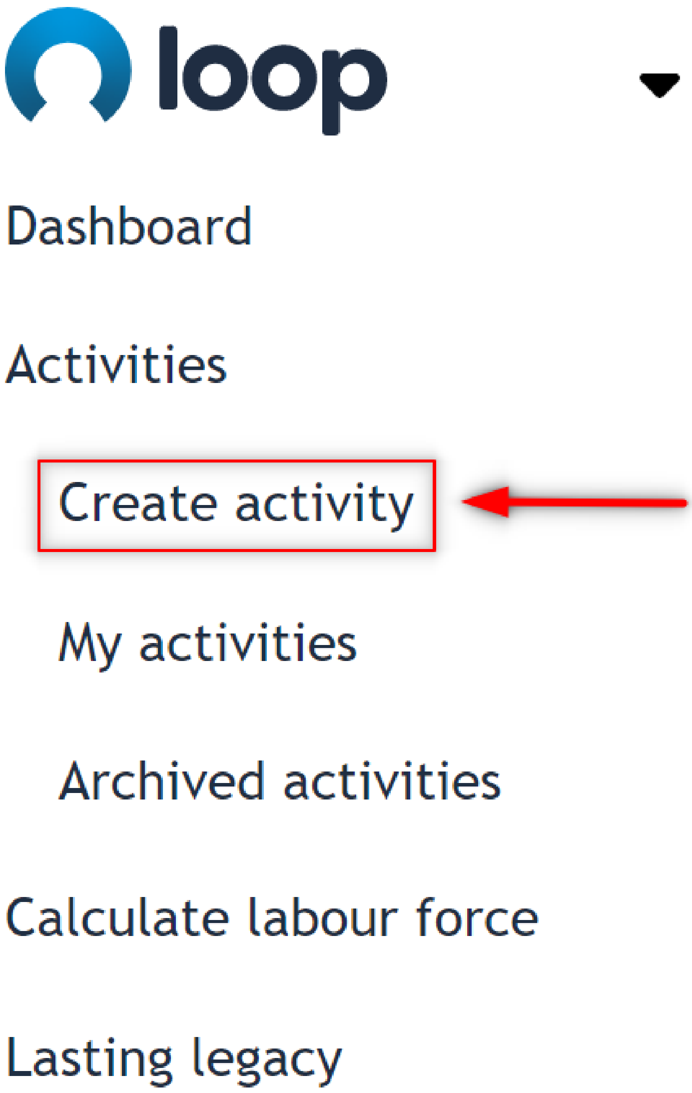
The next few sections will cover how to create an activity and input metrics at the forecast stage. For a full explanation of what the forecast stage of an activity is, please refer to Section 3. Glossary of Terms.

To begin with, navigate to the main tool bar. You can do this by clicking the four blue lines in the top left corner of the software as shown highlighted in red in the image below.

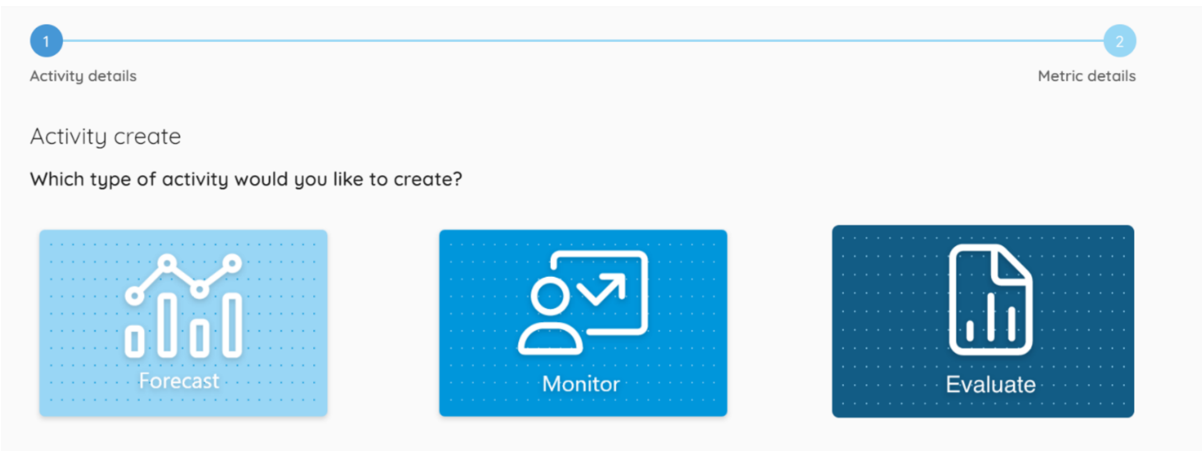
The main tool bar will then appear on the left-hand side of the screen, from here click the 'Activities' tab as shown with the red arrow in the image below.



Once you've clicked activities three more options will appear below, these options will be 'Create activity' , 'My Activities' and 'Archived activities'. Select the first option labelled 'Create activity' as highlighted in the image below.



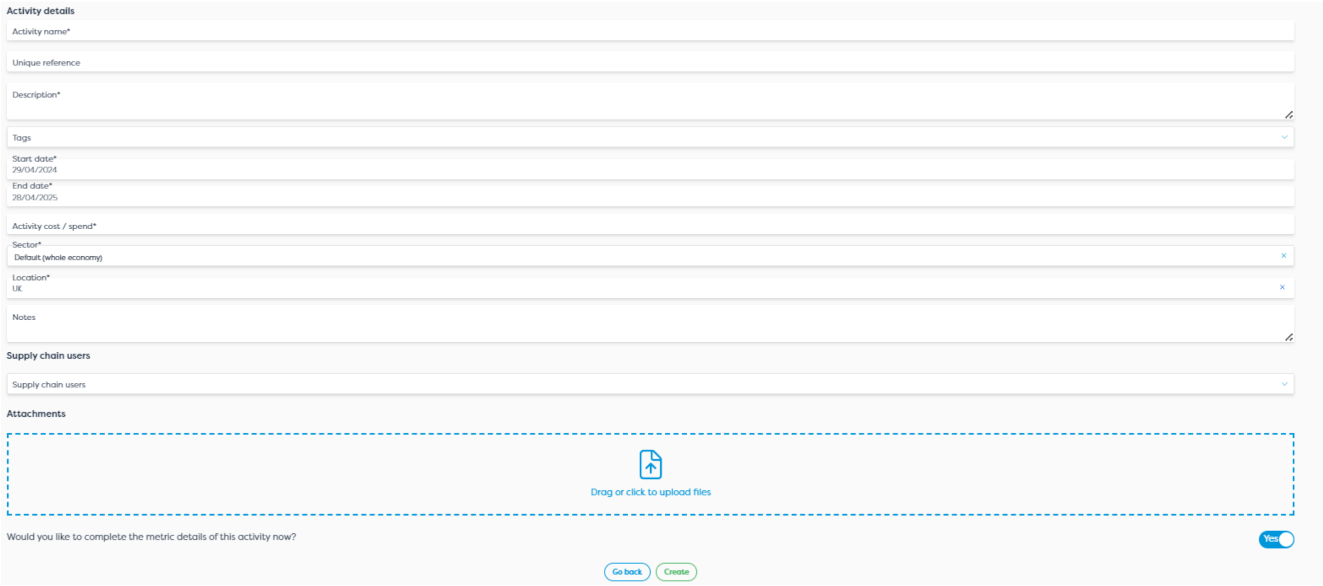
You will be taken through to the activity page (Image below) to choose which stage of an activity you wish to set up. For a full explanation of each stage of an activity please refer to the Section 3. Glossary of Terms



In this example we will be going through a forecast. Once you click the forecast tile, the 'Activity Details' section will appear underneath. The next section will cover the activity details, explaining in more detail the mandatory & non-mandatory fields.

8.1 Activity Details

Once you have chosen a forecast activity and the activity details section has appeared (as discussed in the previous section [8. How to create an Activity – Forecast](#) then you can start to fill in the details of the activity you are forecasting as shown below.

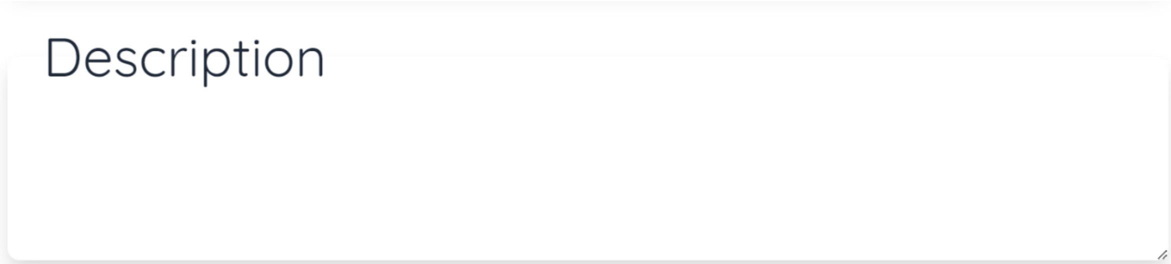


The first field is the 'Activity name', this will be the main name of your activity such as 'Westfield Redevelopment'. An example is shown below.

You can also use this field for any internal reference systems you might use within your organisation. Under the 'My Activities' section when searching through your activities, anything within the 'Activity name' can be searched for. So, for example I have used 'Client A' as a basic reference, I will now be able to search through my activities for 'Client A' to save on time. This information will also be displayed in the Activity report.

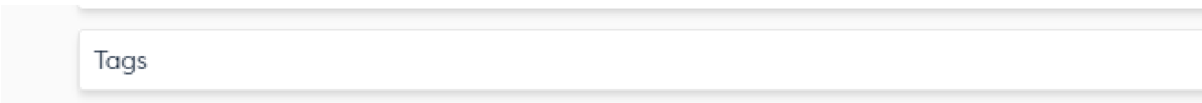
Just below your 'Activity Name' is a field labelled 'Unique reference' and will allow you to label your project with any internal reference number being used for your activity.

Just below your 'Unique reference' is a larger text box labelled 'Description' to add additional information for your activity as seen in the image below.

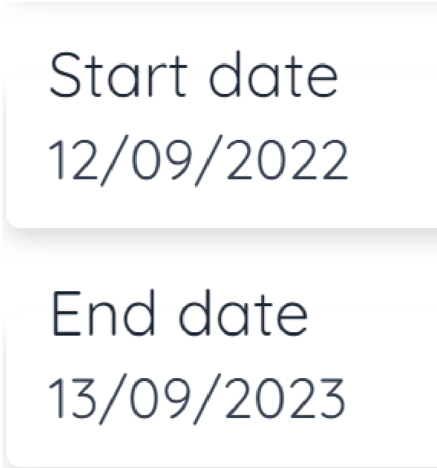


You can use this field to add additional information about the type of activity that is being carried out and any other useful information. In the bottom right corner of the field are two diagonal black lines that can be used to adjust the size of the description box.

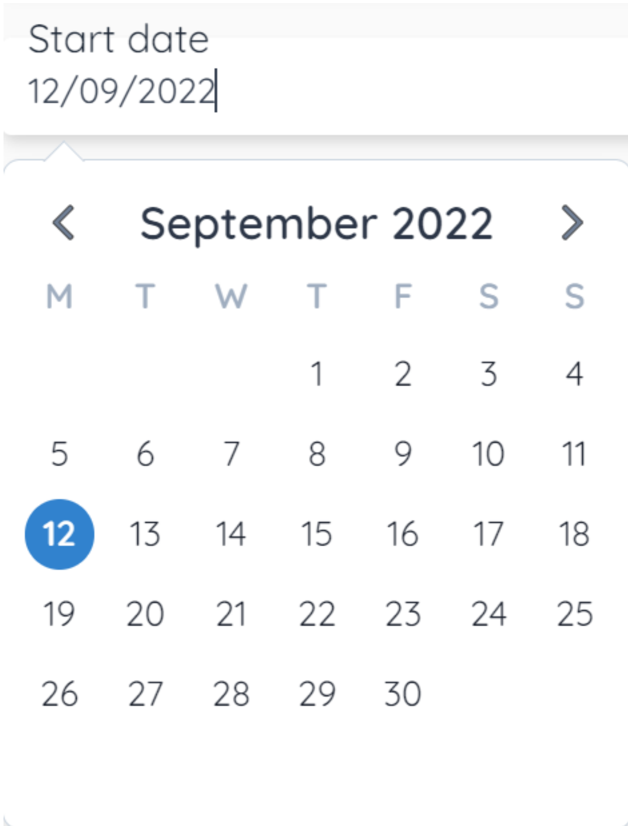
After completing the description, next is the 'Tags' section. Tagging is a feature which sees various activities be assigned to a specific keyword, allowing you to label or categorise your projects and then using the Activities or Main Dashboard filters, group those projects together for exporting or viewing the data.



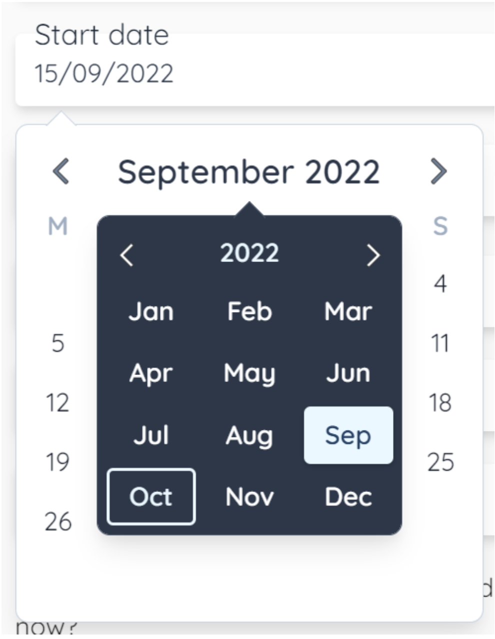
Once you've completed the tags, the next two fields to fill in are the 'Start Date' and 'End Date'. You can see in the image below that the system automatically selects whatever today's date is for the start date and 12 months later as the end date.



To update either the start or the end date, simply click on the field for the date you wish to change. A calendar will then appear for you to be able to select a date as you can see in the image below.



To quickly change the month or year of the calendar, click on where it says ‘September 2022’ in the example above. Another pop up will appear as shown in the image below, from here you can quickly select a month for that year or change between years.



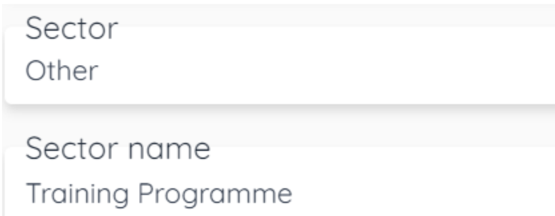
The exact same process can be used for amending the 'End Date'.

Once you've filled in your start and end date, you need to enter your 'Activity cost / spend' in the field just below, as shown by the example of £100,000 In the image below.

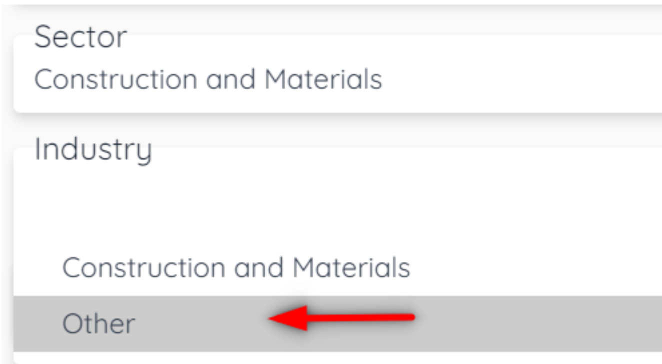
Once you've entered the cost/spend, you will need to enter the Industry and Sector in which your activity is based in. The system has some preset choices as well as the ability to create your own industries and sectors not covered in the presets.

Click on the field labelled 'Sector' and a drop down will appear as shown in the image below. There are 7 preset sectors ranging from the 'Built Environment' to 'Waste & Utilities'. The last option labelled 'Other' allows you to create your own 'Sector' to label your activity with.

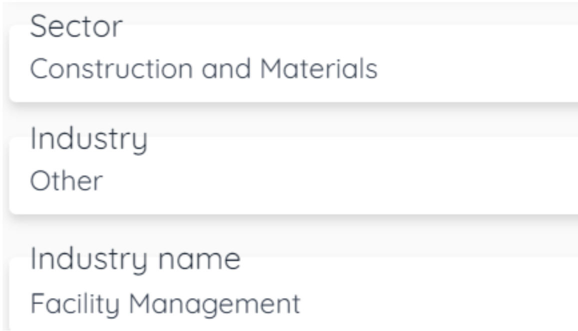
Click ‘Other’ and another field will appear below labelled ‘Sector name’ , simply enter the name of the sector you wish to create that isn’t in the list such as ‘Telecommunications’ as shown in the example below.



You can also create your own bespoke ‘Industry’ under any of the predetermined Sector’s. Choose the sector you wish to create an industry under such as the ‘Built Environment’, then in the field underneath for ‘Industry’ choose the last option ‘Other’ as highlighted with the red arrow in the image below.



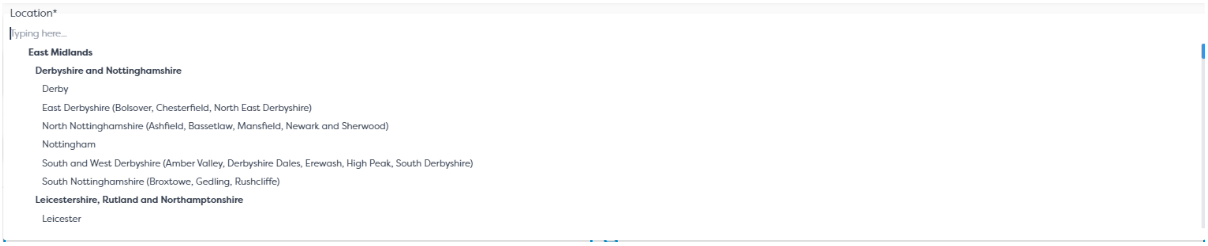
Another field will then appear underneath and here you can create your own ‘Industry Name’ such as Facility Management as shown in the example below.



Once you have selected / created your ‘Sector’ and ‘Industry’ you will need to set the geographic location of your activity.

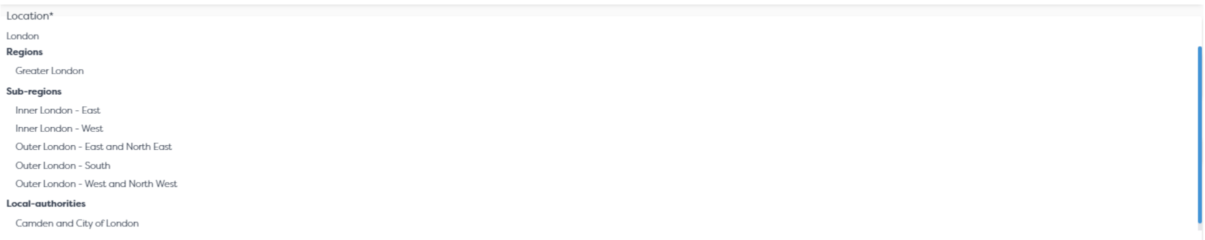
To choose your activity location, there are three levels for you to be able select from for the location. You have the option to choose a specific Region, Sub-Region, and Local authority. Each area has its own regional weighting depending on the level of deprivation for the Region, Sub-Region, or Local authority you choose. Meaning you will get different monetised values for the metrics depending on the location and level of deprivation for that area.

To begin, start by clicking the field labelled ‘Region’ and from the drop-down list choose the UK ‘Region’ in which your activity is taking place as shown in the example below.



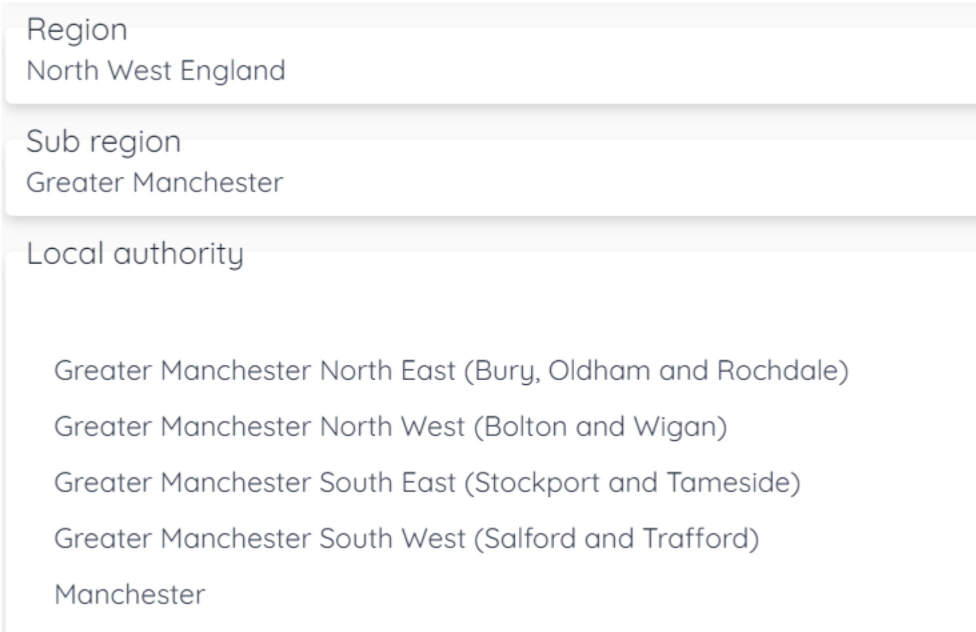
If you are carrying out a nationwide report, select the UK region as highlighted in blue in the image above. If your activity is for a specific location/region, choose it from the drop down list such as ‘North West England’. Once you have chosen a region you can then choose a ‘Sub-region’ from the region you have chosen as shown in the example below.

(if your activity is covering multiple areas within a region then don’t select a ‘Sub-Region’ or ‘Local Authority’ and click ‘Create’ at the bottom of the page and move onto ‘Section’ 8.2 Metric Details.)

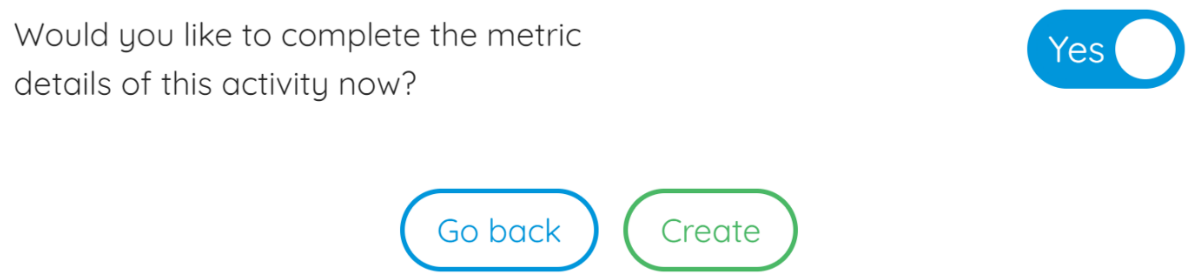


In this example I selected 'North West England' as our region, for the 'Sub-region' the list will show areas that relate to your chose region such as 'Cheshire', 'Cumbria', 'Greater Manchester' etc. as shown above.

Once you have chosen your desired 'Sub-region', click the 'Local authority' field and you will see the list of authorities that relate to your chosen 'Sub region' as shown in the example used below.



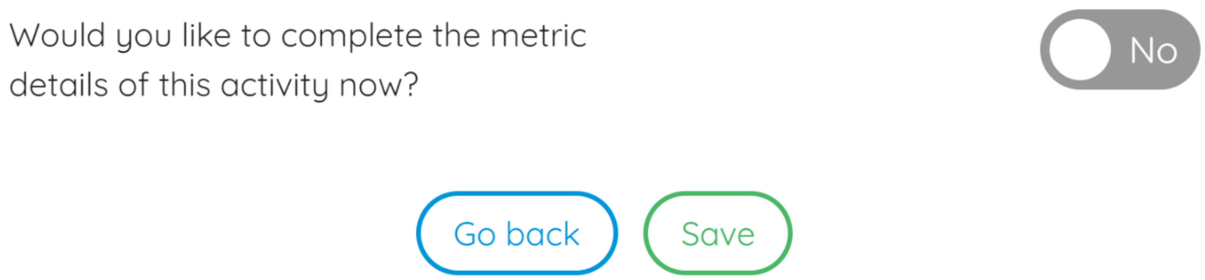
Once you've selected your desired authority click the green 'Create' button at the bottom of the screen to move onto completing the metric details of your activity forecast as shown in the example below.



You will then be redirected onto the metric details page to begin adding metrics/targets to your forecast project, please move on to the next Section 8.2 Metric Details.

You can come back at any point to amend any details on the forecast 'Activity details'.

There is also the option to just set up the ‘Activity details’ page and come back and add metric details later. If you click the blue toggle labelled ‘Yes’, this will allow you to just save the activity and return later to add your metric details. Simply click the ‘Yes’ button and then green ‘Save’ button as shown below.



8.2 Metric Details

The metric details section of a forecast activity allows you to set targets/commitments that you plan to achieve during the project/contract/initiative duration. You can then download a report in three different formats to use as part of bid/tenders, fund request etc. to showcase the social value you would create if you were to complete the activity.

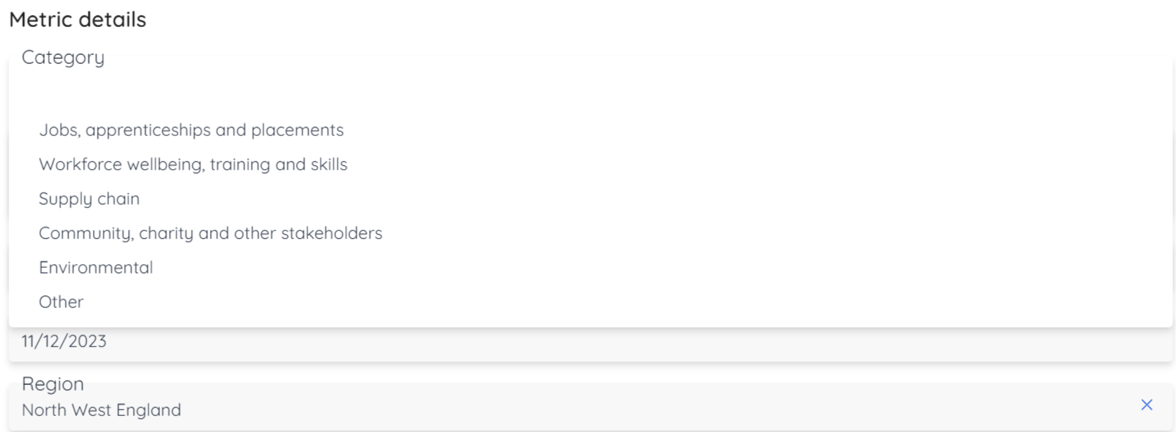
The next section will show you how to add a metric / target to your forecast project.

8.2.1 How to add metric details

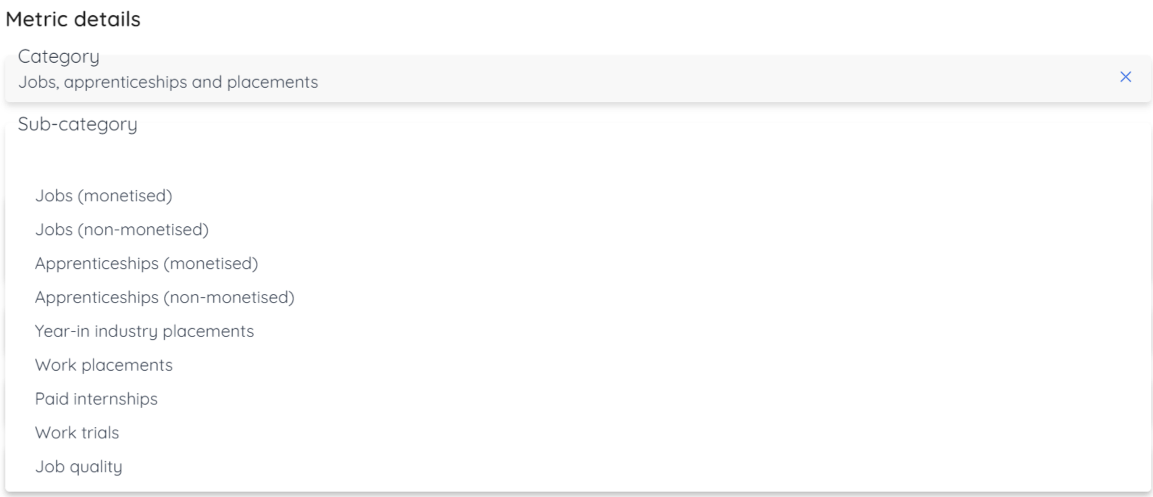
Once you’ve set up and saved the ‘Activity details’ as shown in section [8.1 Activity Details](#) you will be redirected to the ‘Metric Details’. From here you can begin adding your target metrics as part of your activity forecast, I have highlighted the first field that you need to select with an arrow in the image below.

Once you click the category field, a drop down will appear with 6 options for you to choose from as you can see in the image below. These categories separate our 800 metrics out into easily understandable categories such as 'Jobs, apprenticeships and placements' , 'Supply Chain' etc. These categories are explained in more detail in Section 4. 'Methodology – National Social Value Standard'.

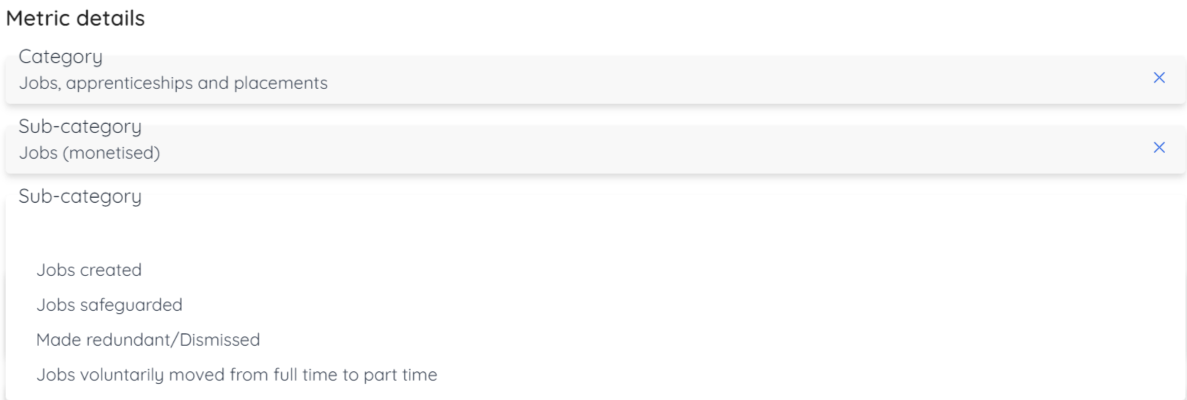
From the drop-down list simply choose the category you would like to select a metric from.



Once you've chosen your desired category, in this example we have chosen 'Jobs, apprenticeships and placements', the next step is you will need to select a sub-category which is the field just underneath. All the sub-categories will relate to your chosen main category. As you can see in the example below, we chose 'Jobs, apprenticeships and placements' as our main category and the sub-categories are 'Jobs (monetised), Jobs (non-monetised) etc.

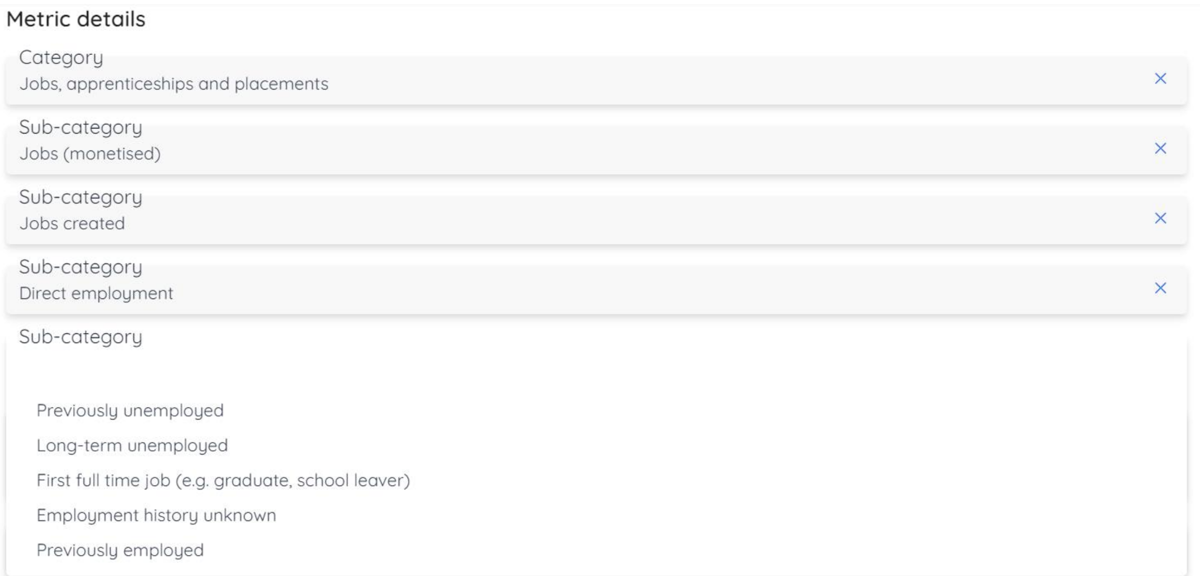


In this example we will be showing you how to set a target for creating a job in the local area. We will be choosing the top sub-category 'Jobs (monetised)'. You will then need to choose a further sub-category this covers a range of options such as 'Jobs created', 'Jobs safeguarded' , 'Made redundant/Dismissed' etc. as you can see in the image below. We will be choosing 'Jobs created' as we are looking to set a target for creating a job in the local area.



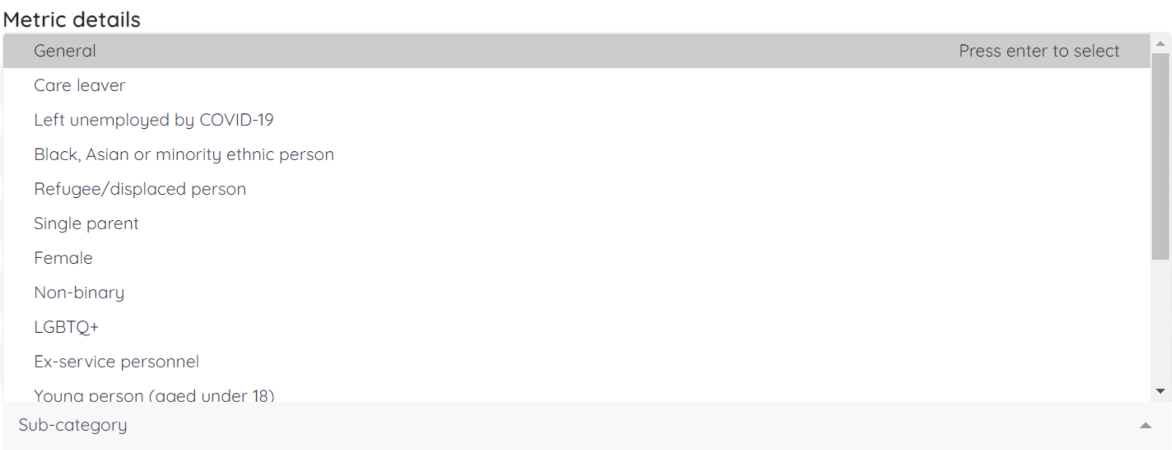
Once you have chosen the 'Jobs created' sub-category, another sub-category field will then appear below for you to choose whether the job being created will be directly employed through your organisation or indirectly employed through your supply chain / sub-contractor. You can see this in the image below, for the purposes of this example we will be choosing direct employment.

Once you have chosen the employment type you will need to set the employment history for the job you are creating. There are several different options such as ‘Previously unemployed’, ‘Long-term unemployed’ etc. There is also an option to choose ‘Employment history unknown’. In the case of a forecast activity you may not know the person you are going to employ yet and therefore won’t know their employment history. Then choose ‘Employment history unknown’. You can see these options in the image below.



Once you have entered the employment history for your job creation metric I have chosen ‘Employment history unknown’ in this example. You will then also need to select some characteristics for the type of person you are looking to hire. You will need to select the blank sub-category field as shown highlighted with an arrow in the below image.

Once you've clicked this field a list of characteristics will appear for the type of person you are looking to hire. These range from 'General' and 'Care leaver' through to 'Ex-offender' and 'Formerly homeless' as you can see in the image below. If you are unsure of the characteristics of the person who you will be looking to hire, you can use the 'general' category at the top of the list. I will be selecting the 'General' characteristics in this example. You can also select multiple characteristics from the drop-down list if needed.



Once you have selected the characteristics, you can finally enter how many jobs you are looking to create, shown in this example. For other metrics such as volunteering etc you will be able to enter your target number of hours or if you are looking at carbon reduction you would enter number of Tonnes. The label above the field will change to showcase this depending on the metric you have chosen. You can see in the image below we have highlighted this field with a red arrow are it displays 'Stakeholders' as we are looking at job creation.

Enter your target in the field labelled ‘Stakeholders’, in this example It will be Full Time Equivalents (FTE) as you can see from the ‘Metric description’ in the image above. If you ever need any additional information about any of our metrics, please refer to the National Social Value Standard (SVS) guide and list of metrics that can be downloaded from the SVS website. The links are provided in section 16. Download links.

In this example I will set a target for 1 stakeholder. Once you’ve set your target there are a few more options you can either decide to change or leave as they are, these are highlighted with red arrows in the image below.

These three fields are the ‘Metric start date’, ‘Metric end date’, and ‘Metric duration’. They are all pre-populated by the activity start and end date. Which is entered in the activity details section. I chose a 12-month period, so when I select any metric the start/end date and the duration will be pre-selected as 12 months as shown in the above image.

To change the ‘Metric Duration’ simply click on either the ‘Metric start date’ or ‘Metric end date’ field and from the calendar pop-up change the dates as desired. The ‘Metric Duration’ will then automatically update to

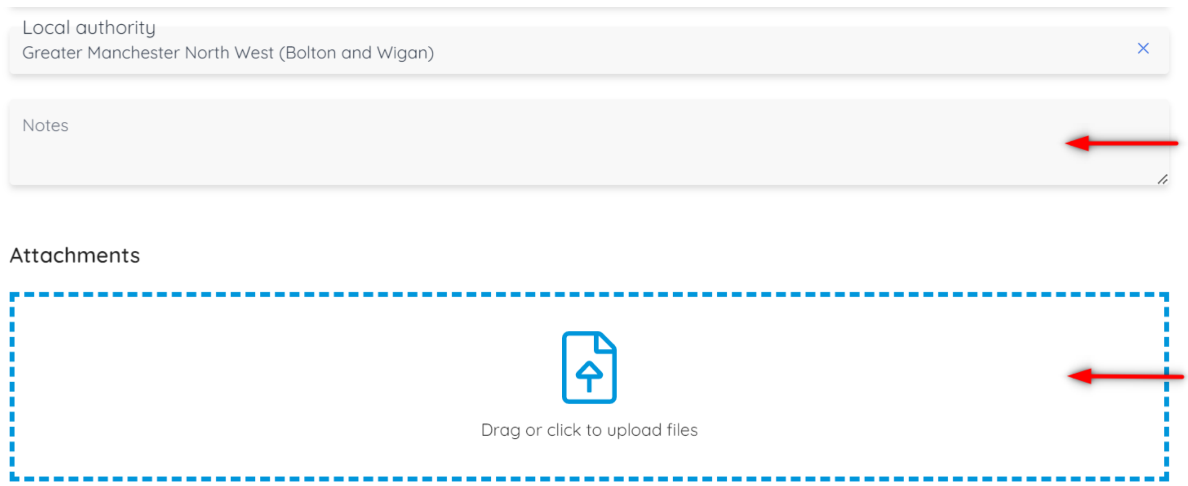
show the correct duration from the dates chosen as you can see in the previous image.

You can then amend the location of your metric if needed, similar to the metric start and end date. The location of your metric will be predetermined by the location you set up in the activity details.

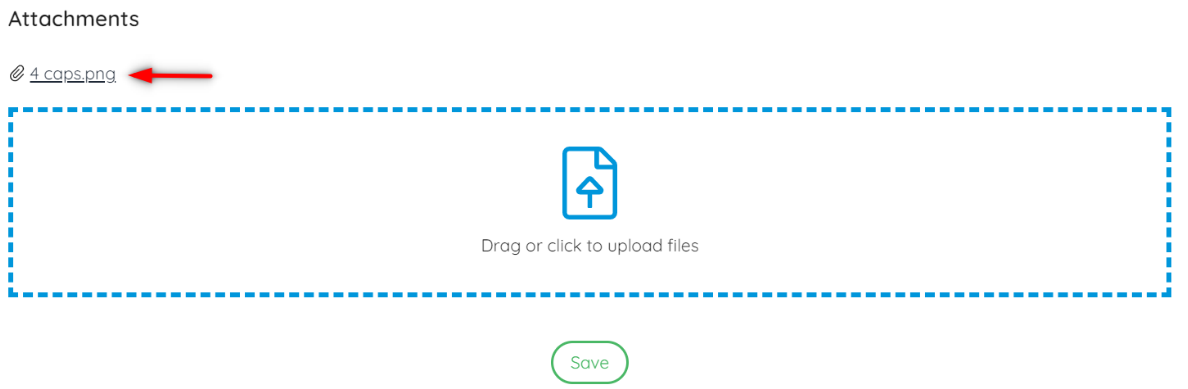
As you can see in the example image below, the three red arrows point to the ‘Region’, ‘Sub-region’ and ‘Local Authority’ that was set up during the ‘Activity details’. You can leave these as they are if your target metric is based in this area.

In the example I am using today I’m looking to set a target for employing 1 person as per the previous instructions. My activity is based in the ‘Local authority’ of ‘Greater Manchester North West (Bolton & Wigan) but you may be looking to hire someone for a different ‘Local authority’. Simply click on the ‘Local Authority’ field and from the drop-down list choose the area you wish to hire the person from. There is no need to change this if you are looking to hire from the same area as where your activity is based. As mentioned previously all locations have regional weighting for metric values depending on the level of deprivation.

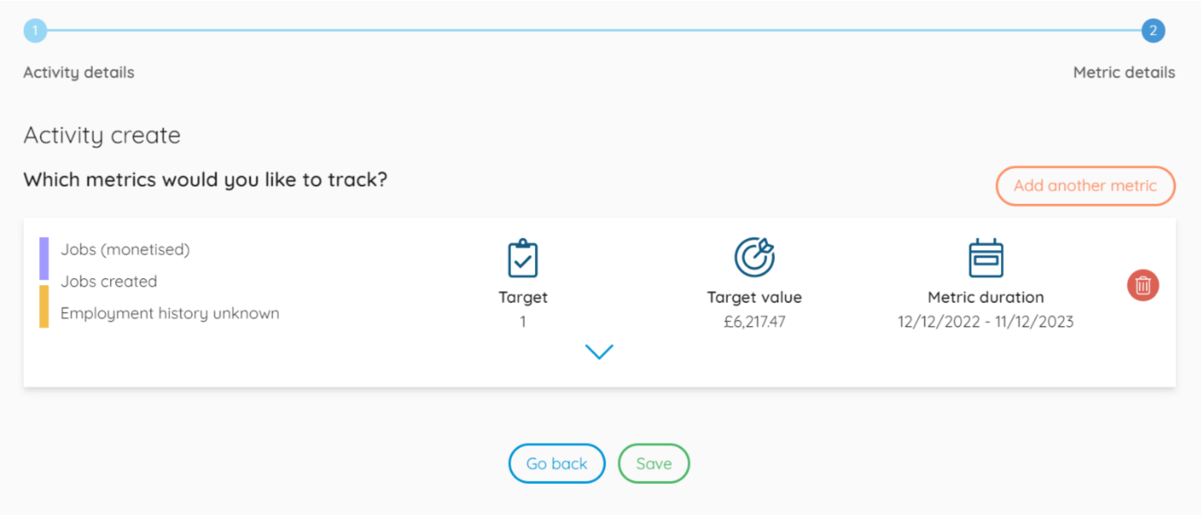
Once you have sorted the location of your metric the last two sections before we can save our target are to leave notes and attach any evidence. As you can see highlighted with red arrows below, the notes section is a large text box for you to add any additional notes to your target / metric. These notes can be seen by any colleagues using the system. You can also attach evidence to support your metric.



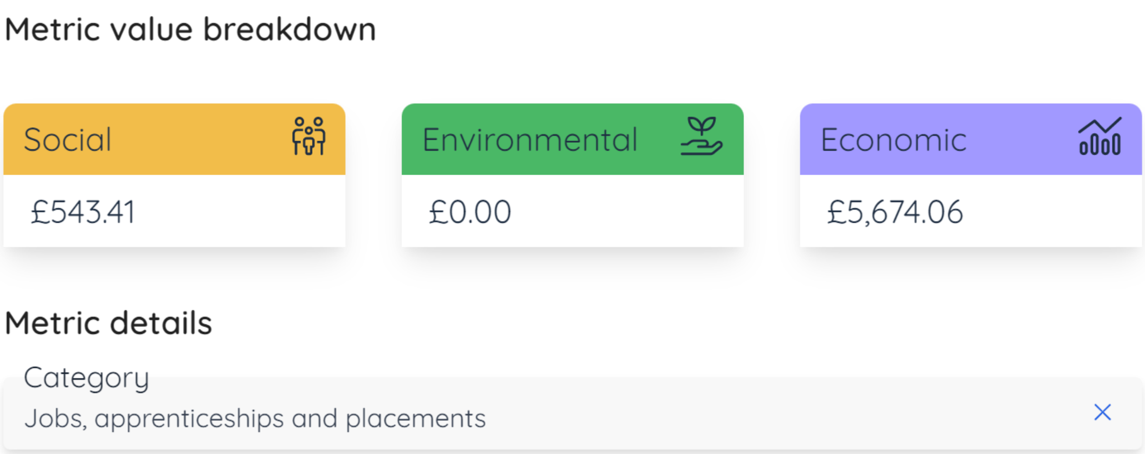
The evidence section is straight forward to use, simply drag a file into the blue field or you can click on the blue field to search through your PC to attach a file. If you have clicked on the evidence section to search your PC, once you've selected the evidence from your files click open and the data will save against your KPI as shown in the image below highlighted with an arrow.



Once you've finished adding evidence to your metric (Please note it's not a requirement to attach evidence but we do recommend it where possible) simply click the green save button underneath the evidence section. The software will do the heavy lifting and calculate the social value your target metric would create if you were to complete the metric. The metric will be saved to your activity as you can see in my example in the image below.



Now that the metric is saved to the activity, you can see the target output, target social value that would be generated and metric duration. You can also see on the far-left hand-side of the metric that there will be either one or two colours. In the example above we can see there is a purple and yellow line. If you were to open the metric again by clicking the downward pointing blue arrow at the bottom of the metric, you can see a breakdown of the value relating to each area as shown in the example below. These colours represent the impact relating to either Social (Yellow) , Environmental (Green) or Economic (Purple).



There is no limit to the number of metrics/targets you can add to your activity. To begin adding another metric simply click the orange ‘Add another metric’ button in the top right corner of the screen as you can see in the example above and follow the same steps that we have just run through.

To save the activity click the green ‘Save’ button at the bottom of the page.

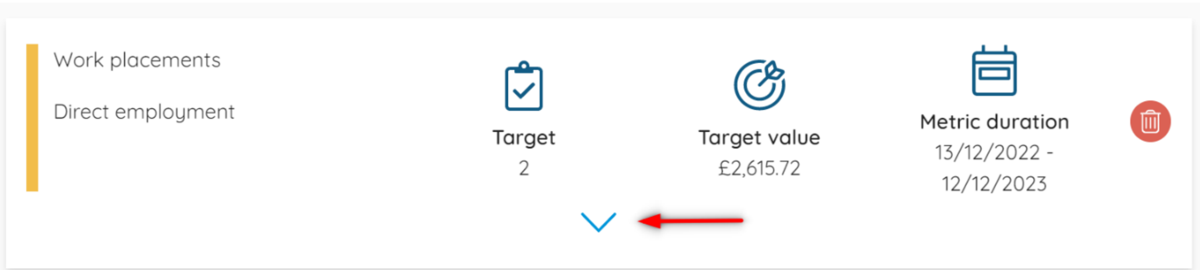
If you need to delete or edit your metric, please refer to section 8.2.2 How to edit/delete metric details. Once you have finished adding metrics to your forecast activity, simply click the green 'Save' button at the bottom of the screen and your activity will be saved. You can now download several different reports to showcase the Social Value you would create if you were to complete this activity. For a full overview of the reports and instructions on how to download a report please refer to section 11.2 Activity dashboard overview (Forecast) and section 11.2.1 How to export a report (Excel, PDF & Word).

If you need to progress your activity from a forecast activity to a monitor project so you can live report data against your targets, then move onto section 8.3 Progressing the activity to monitoring stage. Only do this if the activity has now gone live as you won't be able to return the activity to the forecast stage once this has progressed.

8.2.2 How to edit/delete metric details.

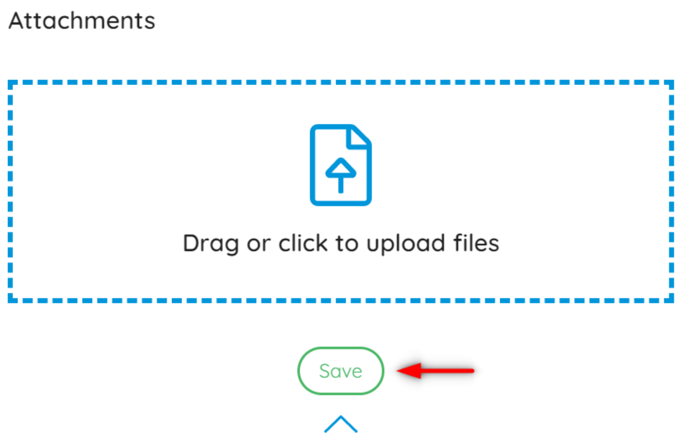
This section will quickly cover how to edit or delete a metric once it has been added to an activity.

To edit a metric click the blue downward arrow at the bottom of the metric you want to edit as you can see in the example below.



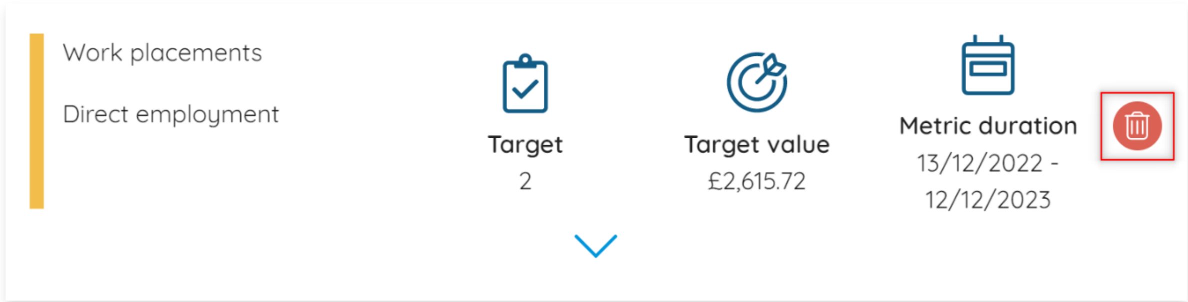
Once you click the arrow the metric details will open just below, and you can make edits to any of the fields. For instructions on how to fill any of the fields in refer to section 8.2.1 How to add metric details.

Once you've made the required edits, to the metric details, scroll to the bottom of the fields and click the green 'Save' button as shown in the image below.



Your updates to the metric will then be recalculated.

To delete a metric, simply locate the metric you wish to remove from the list on the 'metric details' page. On the far right of the metric there will be a red bin icon (see image below), click the icon and your metric will be deleted from your activity.

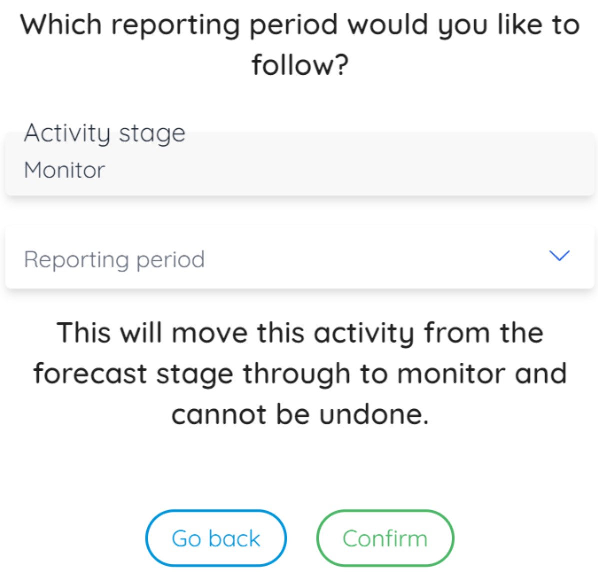


8.3 Progressing the activity to monitoring stage.

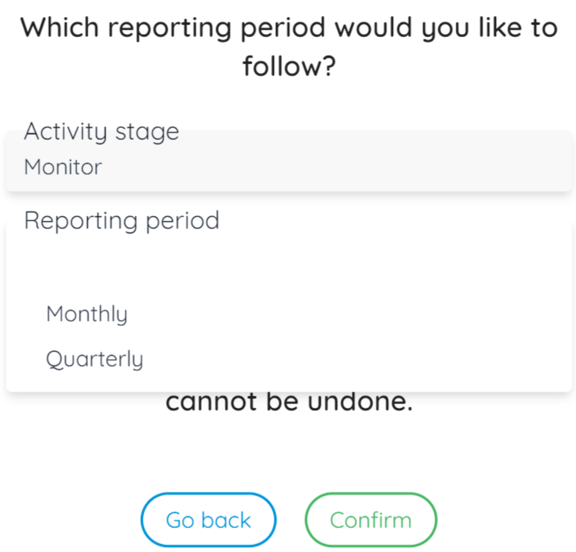
Progressing your activity from 'Forecast' to 'Monitor' can be used when the project goes live. You can use the monitor stage to track what you are managing to achieve against the original commitments you set in the forecast stage.

To progress the activity, go to either the 'Activity details' page or the 'Metric details' page and scroll right down to the bottom. You will see there are three buttons to choose from 'Go back', 'Edit activity' and the option you will need to choose 'Progress activity' as highlighted in the image below.

Once you click progress activity a pop-up will appear asking 'Which reporting period would you like to follow?' as shown below.



Once you the pop-up has appeared to progress the activity, there is a field underneath labelled 'Reporting period'. This is so you can choose how often you wish to report data against your initial targets. The two options are either 'Monthly' or 'Quarterly' as shown in the example below. The only difference being you will need to track and report data against your metrics on a monthly or quarterly basis.



Once you've selected your reporting period, I've selected 'Monthly' in my example click the green 'Confirm' button at the bottom of the pop up. The activity will then be progressed through and turned into a live monitor activity. You will receive a confirmation message across the top of your screen advising 'Success! The activity has been progressed to the monitoring stage.' As shown in the example screenshot below.

You will then be redirected to the 'Activity details' page which will have been pulled through from the forecast stage, so you don't have to re-enter any information.

You can amend any of the activity details other than the 'Start date' and the 'reporting period'. This is because once the project has been moved to the monitoring stage the calculations are done from that set 'Start date' and either monthly or quarterly depending on your choice. Calculations would be affected if you were able to change either of these. You will need to recreate your activity if either the start date or reporting period are incorrect at this point.

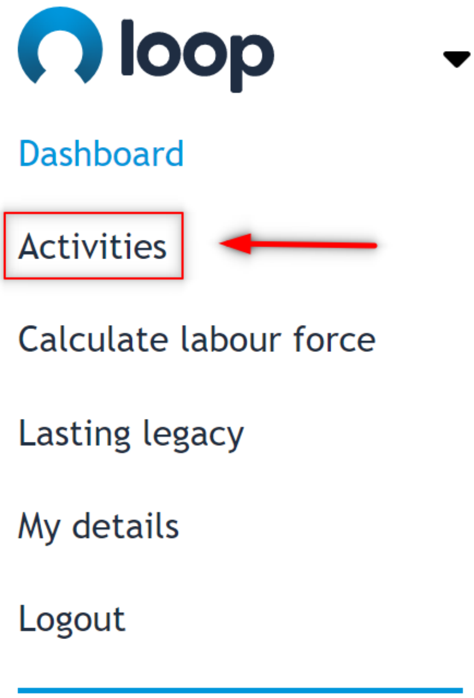
Now that your activity is in the monitoring stage you can begin to enter data and track this against your initial metric targets. For instructions on how to do this please refer to section 9.2.2 How to add data against a metric.

9. How To Create an Activity – Monitor

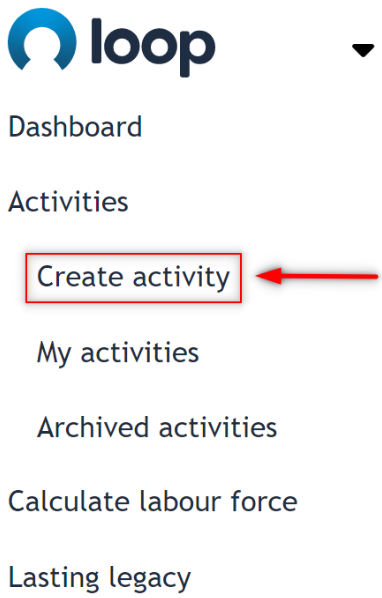
The next few sections will cover how to create an activity and input metrics at the monitor stage. For a full explanation of what the monitor stage of an activity is, please refer to Section 3. Glossary of Terms.

To begin with, navigate to the main tool bar. You can do this by clicking the four blue lines in the top left corner of the software as shown highlighted in red in the image below.

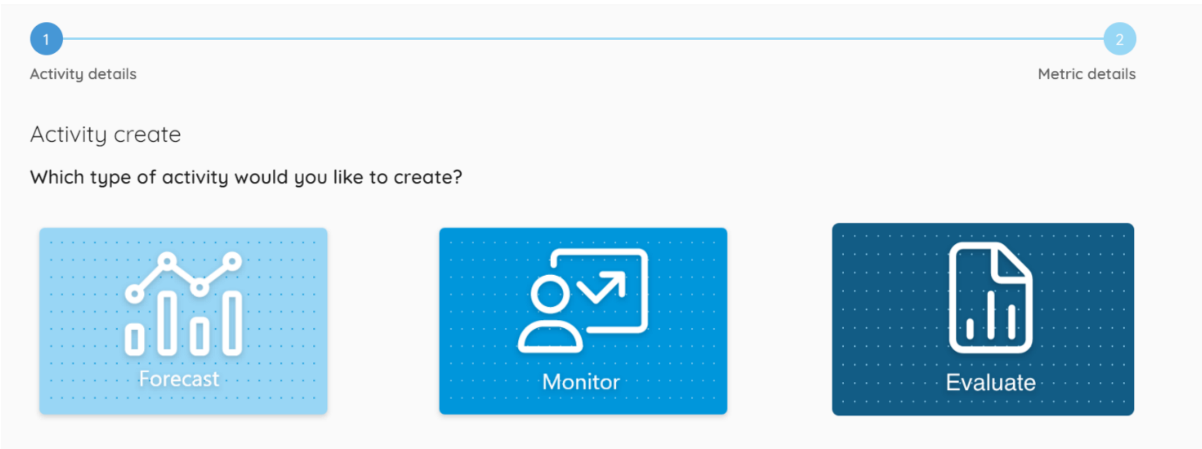
The main tool bar will then appear on the left-hand side of the screen, from here click the 'Activities' tab as shown with the red arrow in the image below.



Once you've clicked activities three more options will appear below, these options will be 'Create activity', 'My Activities' and 'Archived activities'. Select the first option labelled 'Create activity' as highlighted in the image below.



You will be taken through to the activity page (Image below) to choose which stage of an activity you wish to set up.



In this section we will be going through a Monitor activity. Once you click the monitor tile, the 'Activity Details' will appear underneath. The next section will cover the activity details.

9.1 Activity Details

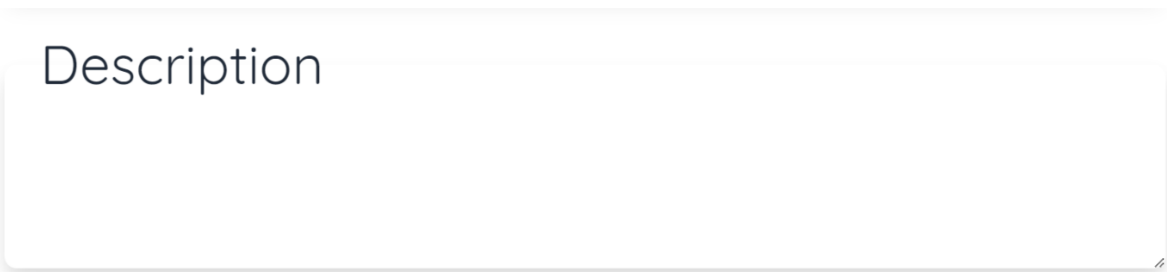
Once you have chosen a Monitor activity and the activity details section has appeared (as discussed in the previous section 8. How to create an Activity – Forecast then you can start to fill in the details of the activity you are monitoring as shown below.

The first field is the ‘Activity name’, this will be the main name of your activity such as ‘Westfield Redevelopment’ or ‘Christmas Community Initiative’ etc. An example activity is shown below.

You can also use this field for any internal reference systems you might use within your organisation. Under the ‘My Activities’ section, when searching through your activities, anything within the ‘Activity name’ can be searched for. For example, I have used ‘Client A’ as a basic reference, I will now be able to search through my activities for ‘Client A’ to save on time. This information will also be displayed in the Activity report.

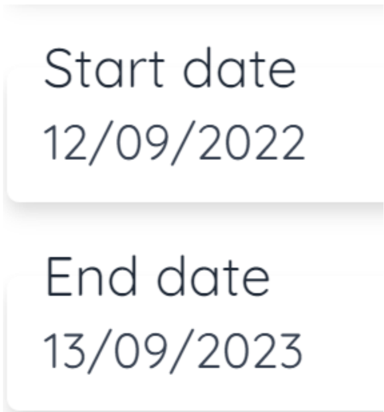
Just below your ‘Activity Name’ is a field labelled ‘Unique reference’ and will allow you to label your project with any internal reference number being used for your activity.

Just below your ‘Activity Name’ is a larger text box labelled ‘Description’ to add additional information for your activity as seen in the image below.

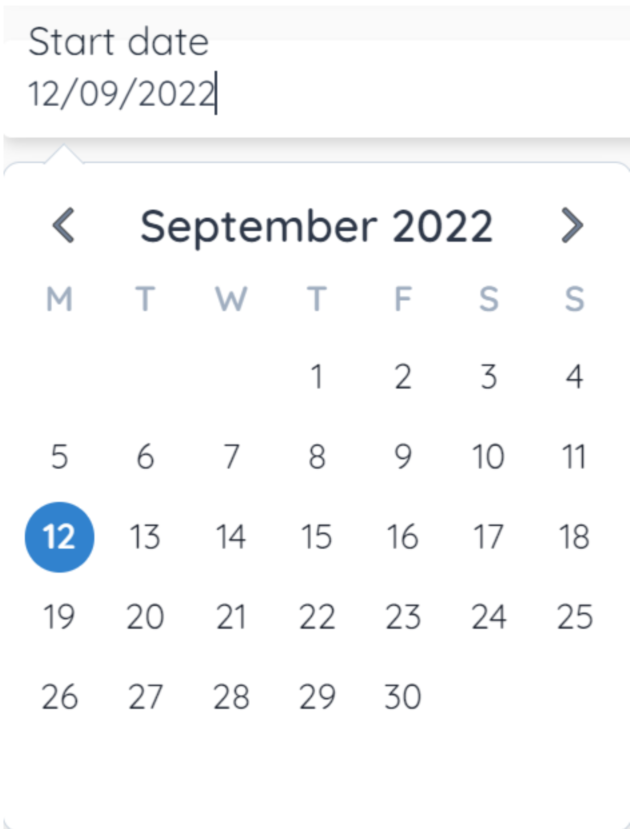


You can use this field to add additional information about the type of activity that is being carried out and any other useful information. In the bottom right corner of the field are two diagonal black lines that can be used to adjust the size of the description box.

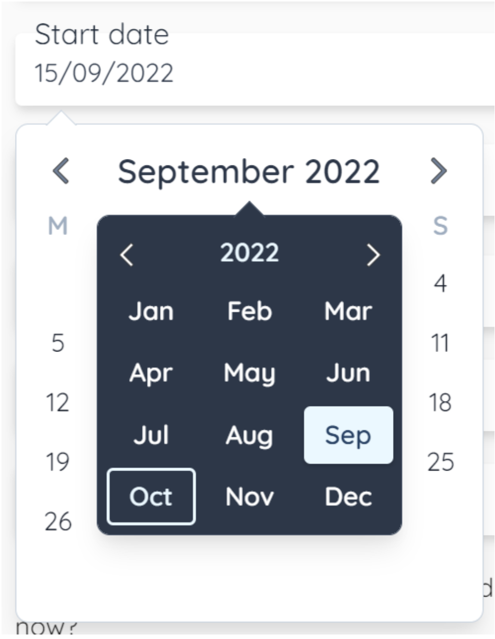
Once you've completed the description, the next two fields to fill in are the 'Start Date' and 'End Date'. You can see in the image below that the system automatically selects whatever today's date is for the start date and 12 months later as the end date.



To update either the start or the end date, simply click on the field for the date you wish to change. A calendar will then appear for you to be able to select a date as you can see in the image below.



To quickly change the month or year of the calendar, click on where it says ‘September 2022’ in the example above. Another pop up will appear as shown in the image below, from here you can quickly select a month for that year or change between years.



The exact same process can be used for amending the ‘End Date’.

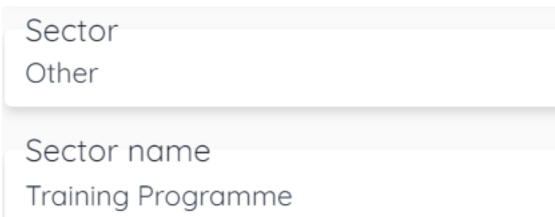
Once you’ve filled in your start and end date, you need to enter your ‘Activity cost / spend’ in the field just below, as shown by the example of £100,000 In the image below.

Now you’ve entered your ‘Activity cost / spend’, the next field to fill in is the ‘Reporting period’. This is so you can choose how often you must enter data against your target metrics. There are two options available either monthly or quarterly as shown in the image below. As an example, choose monthly and on a 12-month project you will have 12 entry boxes to enter data against your metrics for each month. Choose quarterly for a 12-month project and you would have 4 entry boxes to enter data against your metrics for each quarter.

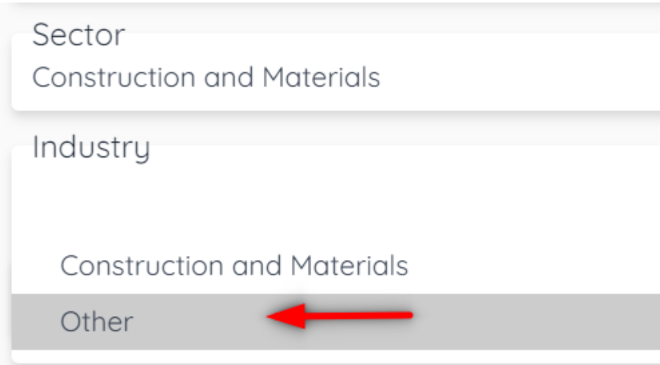
Once you've entered the reporting period, you will need to enter the Industry and Sector in which your activity is based in. The system has some preset choices as well as the ability to create your own industries and sectors not covered in the presets.

Click on the field labelled 'Sector' and a drop down will appear as shown in the image below. There are 7 preset sectors ranging from the 'Built Environment' to 'Waste & Utilities'. The last option labelled 'Other' allows you to create your own 'Sector' to label your activity with.

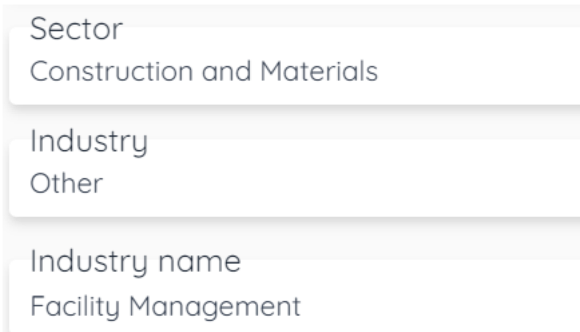
Click 'Other' and another field will appear below labelled 'Sector name' , simply enter the name of the sector you wish to create that isn't in the list such as 'Telecommunications' as shown in the example below.



You can also create your own bespoke ‘Industry’ under any of the predetermined sectors. Choose the sector you wish to create an industry under such as the ‘Built Environment’, then in the field underneath for ‘Industry’ choose the last option ‘Other’ as highlighted with the red arrow in the image below.



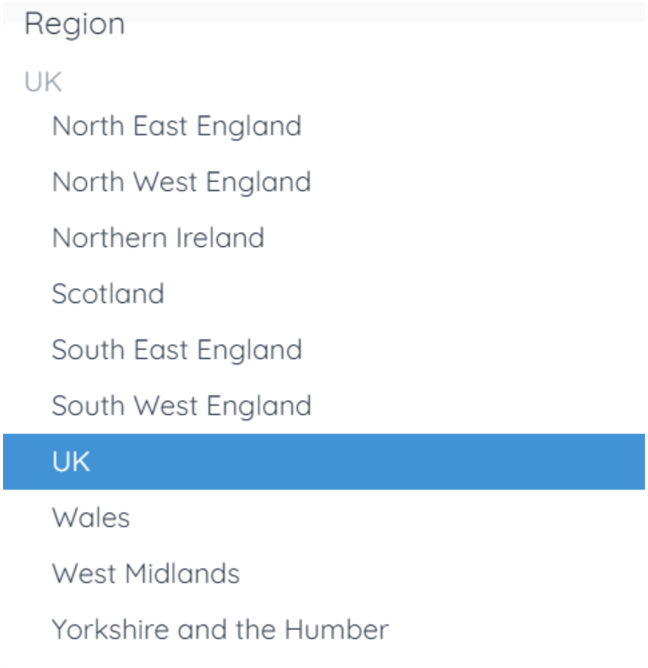
Another field will then appear underneath and here you can create your own ‘Industry Name’ such as Facility Management as shown in the example below.



Once you have selected / created your ‘Sector’ and ‘Industry’ you will need to set the geographic location of your activity.

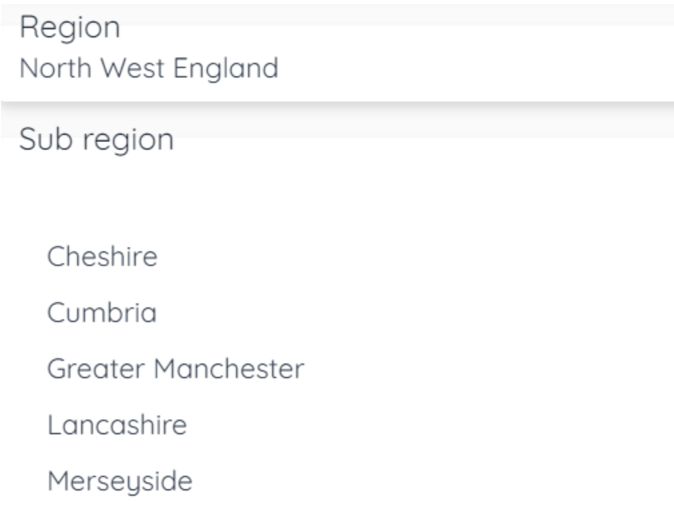
To choose your activity location, there are three levels for you to be able select from for the location. You have the option to choose a specific Region, Sub-Region, and Local authority. Each area has its own regional weighting depending on the level of deprivation for the Region, Sub-Region, or Local authority you choose. Meaning you will get different monetised values for the metrics depending on the location and level of deprivation for that area.

To begin, start by clicking the field labelled ‘Region’ and from the drop-down list choose the UK ‘Region’ in which your activity is taking place as shown in the example below.



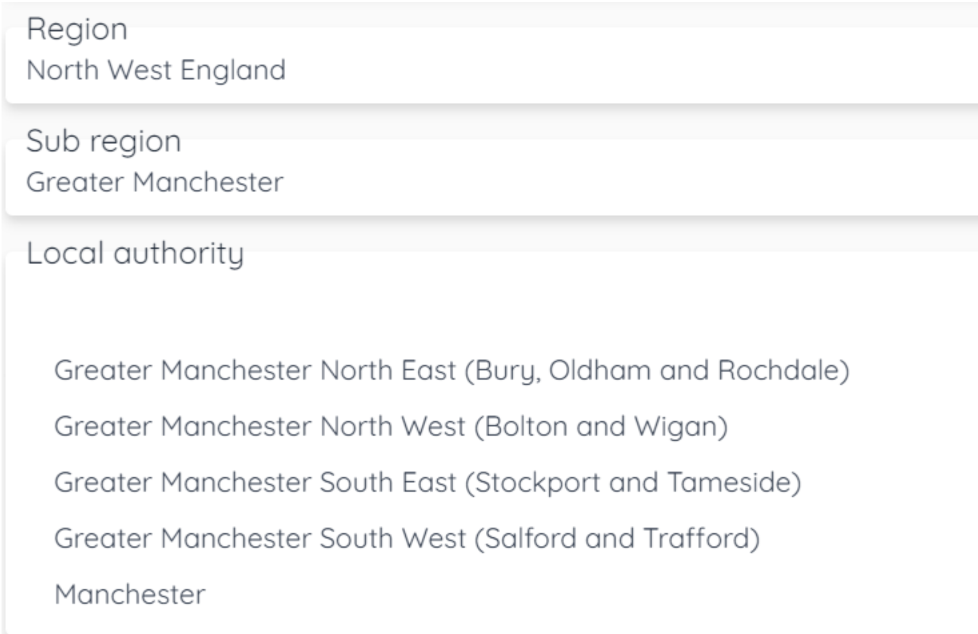
If you are carrying out a nationwide report, select the UK region as highlighted in blue in the image above. If your activity is for a specific location/region, choose it from the drop down list such as 'North West England'. Once you have chosen a region you can then choose a 'Sub-region' from the region you have chosen as shown in the example below.

(if your activity is covering multiple areas within a region then don't select a 'Sub-Region' or 'Local Authority' and click 'Create' at the bottom of the page and move onto 'Section' 9.2 Metric Details.)

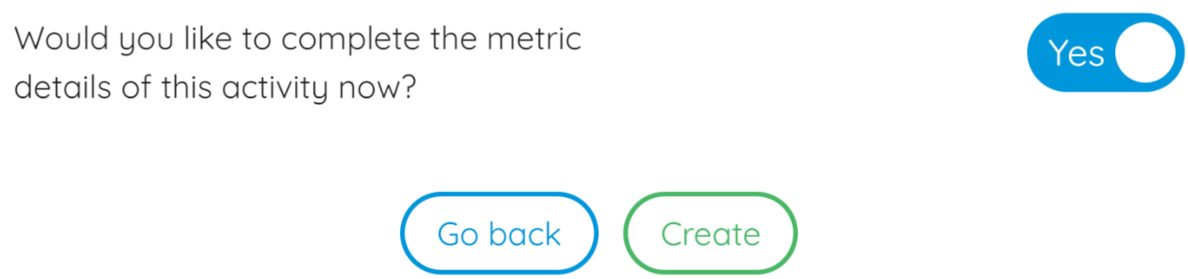


In this example I selected 'North West England' as our region, for the 'Sub-region' the list will show areas that relate to your chose region such as 'Cheshire', 'Cumbria', 'Greater Manchester' etc. as shown above.

Once you have chosen your desired 'Sub-region', click the 'Local authority' field and you will see the list of authorities that relate to your chosen 'Sub region' as shown in the example used below.



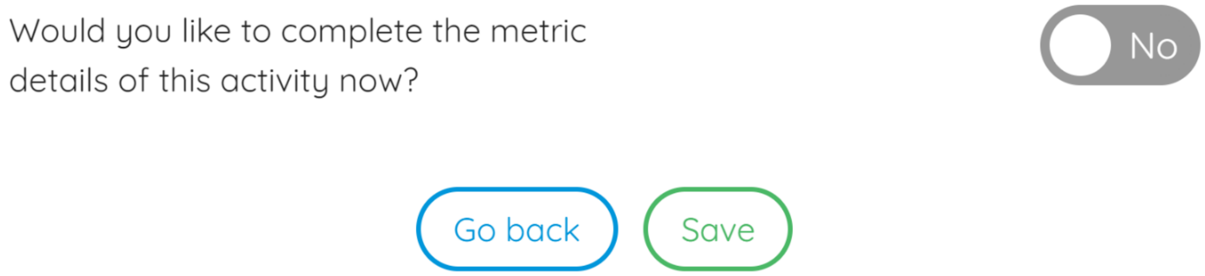
Once you've selected your desired authority click the green 'Create' button at the bottom of the screen to move onto completing the metric details of your activity forecast as shown in the example below.



You will then be redirected onto the metric details page to begin adding metrics/targets to your forecast project, please move on to the next [Section 9.2 Metric Details.]

You can come back at any point amend any of the activity details other than the 'Start date' and the 'reporting period'. This is because once the project has been created in the monitoring stage the calculations are done from that set 'Start date' and either monthly or quarterly reporting depending on your choice. Calculations would be affected if you were able to change either of these. You will need to recreate your activity if either the start date or reporting period are incorrect once you've saved your activity details.

There is also the option to just set up the ‘Activity details’ page and come back and add metric details later. If you click the blue toggle labelled ‘Yes’, this will allow you to just save the activity and return later to add your metric details. Simply click the ‘Yes’ button and then green ‘Save’ button as shown below.



9.2 Metric Details

The metric details section of a monitor activity allows you to set metric targets that you plan to achieve during the project/contract/initiative duration and then track your data against these to showcase the actual value you have achieved throughout the activity. You can then download a report in three different formats to use as part of bid/tenders, fund request etc. to showcase the social value you have created against your initial targets.

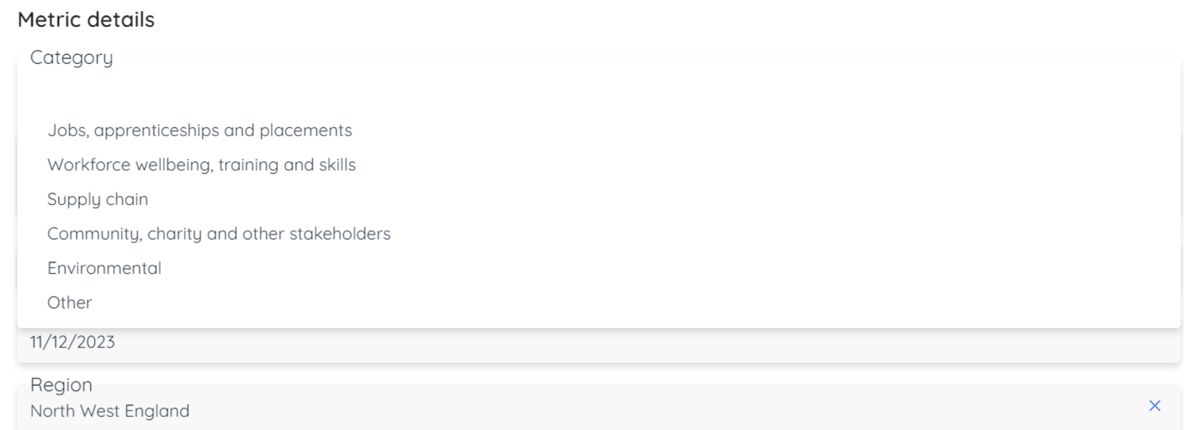
The next section will show you how to add a metric target to your monitor project.

9.2.1 How to add a target/metric.

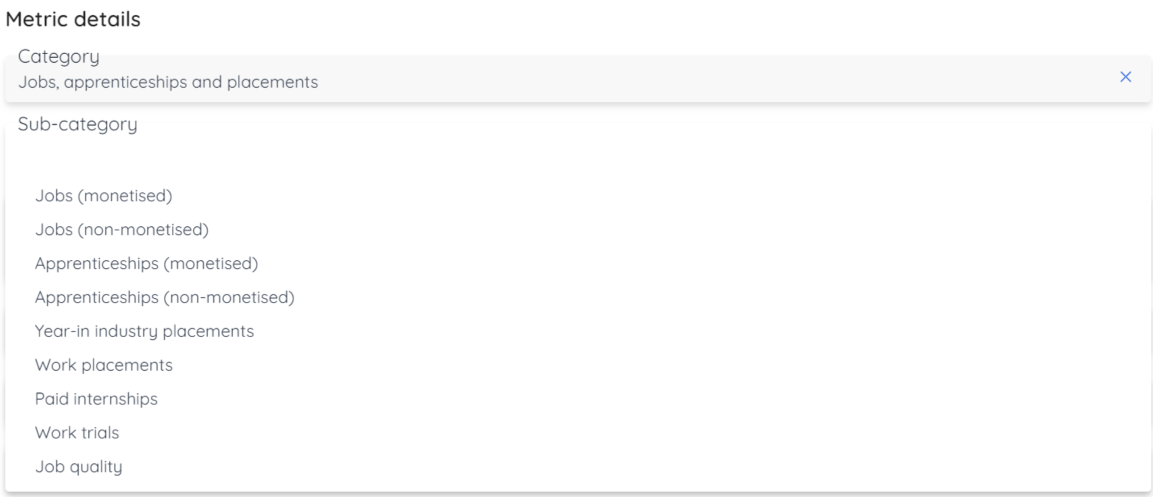
Once you’ve set up and saved the ‘Activity details’ as shown in section 9.1 Activity Details you will be redirected to the ‘Metric Details’. From here you can begin adding your target metrics as part of your monitor activity, I have highlighted the first field that you need to select with an arrow in the image below. Once you’ve set your metric target you can add real life data against your targets to show what you have achieved against the initial target. For instructions on how to add data against a metric please refer to section 9.2.2 How to add data against a metric.

Once you click the category field, a drop down will appear with 6 options for you to choose from as you can see in the image below. These categories separate our 800 metrics out into easily understandable categories such as 'Jobs, apprenticeships, and placements', 'Supply Chain' etc. These categories are explained in more detail in [Section 4. 'Methodology – National Social Value Standard'.]

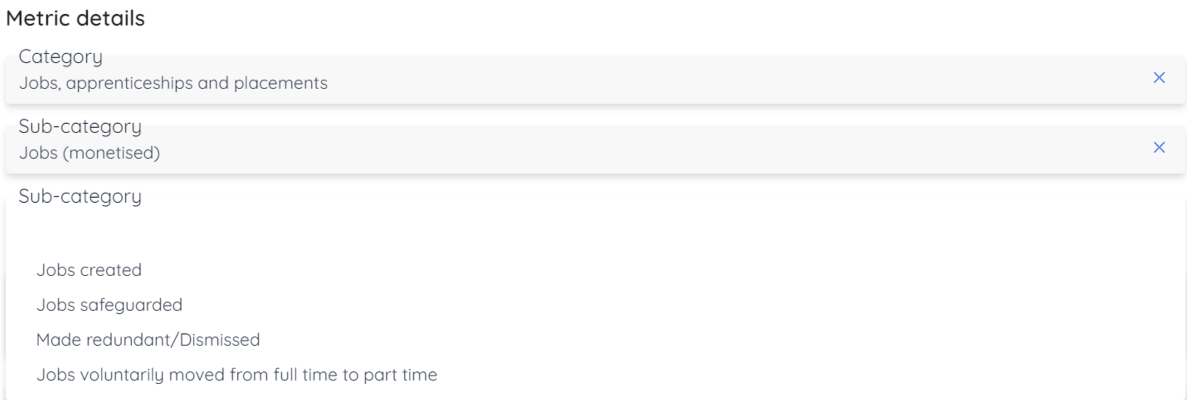
From the drop-down list simply choose the category you would like to select a metric from.



Once you've chosen your desired category, in this example we have chosen 'Jobs, apprenticeships and placements', the next step is you will need to select a sub-category which is the field just underneath. All the sub-categories will relate to your chosen main category. As you can see in the example below, we chose 'Jobs, apprenticeships and placements' as our main category and the sub-categories are 'Jobs (monetised), Jobs (non-monetised) etc.

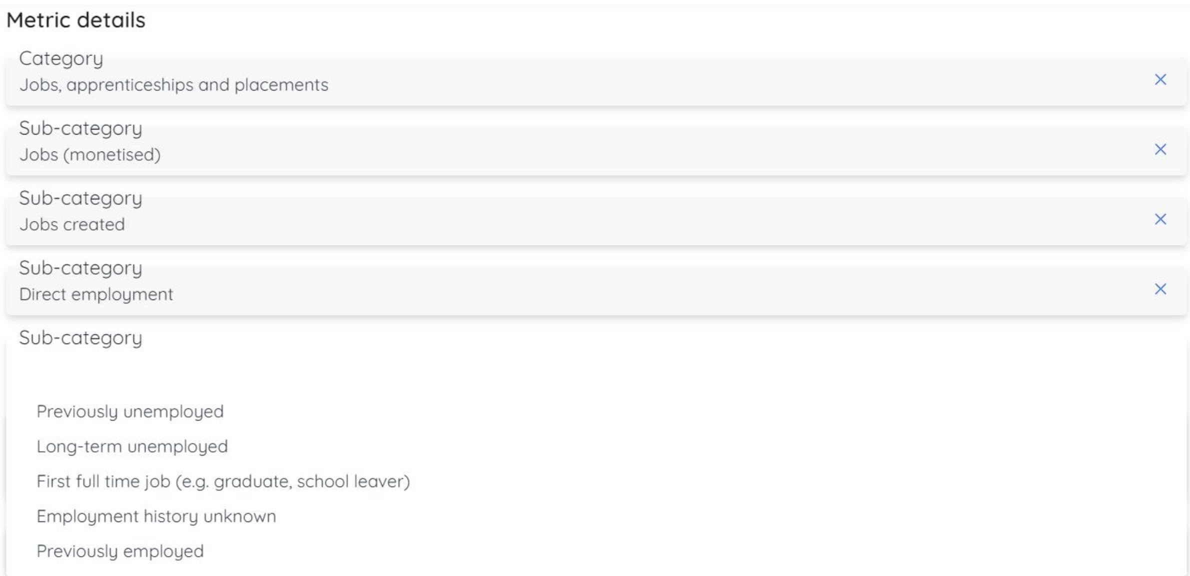


In this example we will be showing you how to set a target for creating a job in the local area. We will be choosing the top sub-category 'Jobs (monetised)'. You will then need to choose a further sub-category this covers a range of options such as 'Jobs created', 'Jobs safeguarded', 'Made redundant/Dismissed' etc. as you can see in the image below. We will be choosing 'Jobs created' as we are looking to set a target for creating a job in the local area.



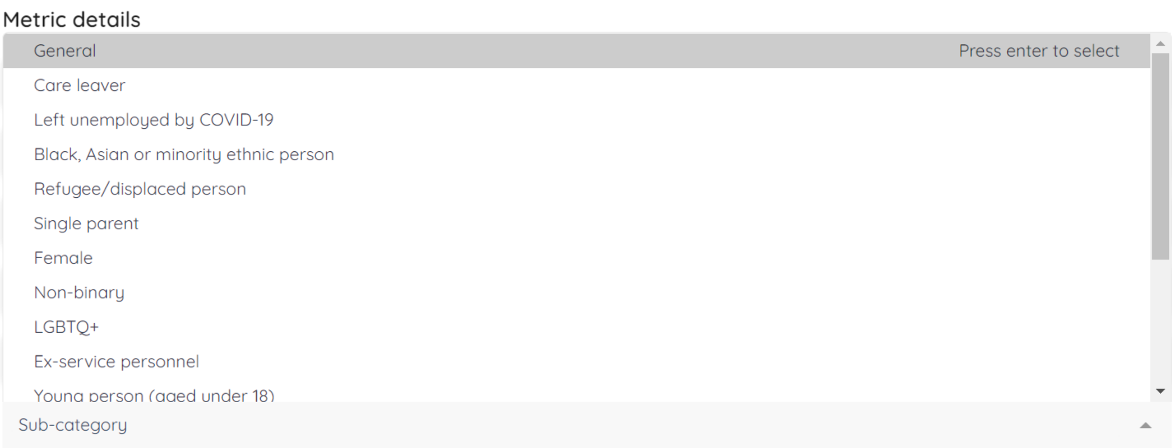
Once you have chosen the 'Jobs created' sub-category, another sub-category field will then appear below for you to choose whether the job being created will be directly employed through your organisation or indirectly employed through your supply chain / sub-contractors. You can see this in the image below, for the purposes of this example we will be choosing direct employment.

Once you have chosen the employment type you will need to set the employment history for the job you are creating. There are several different options such as ‘Previously unemployed’, ‘Long-term unemployed’ etc. There is also an option to choose ‘Employment history unknown’. In the case of setting targets as part of your monitoring activity you may not know the person you are going to employ yet and therefore won’t know their employment history until you’ve hired them. Simply choose ‘Employment history unknown’. You can see these options in the image below.

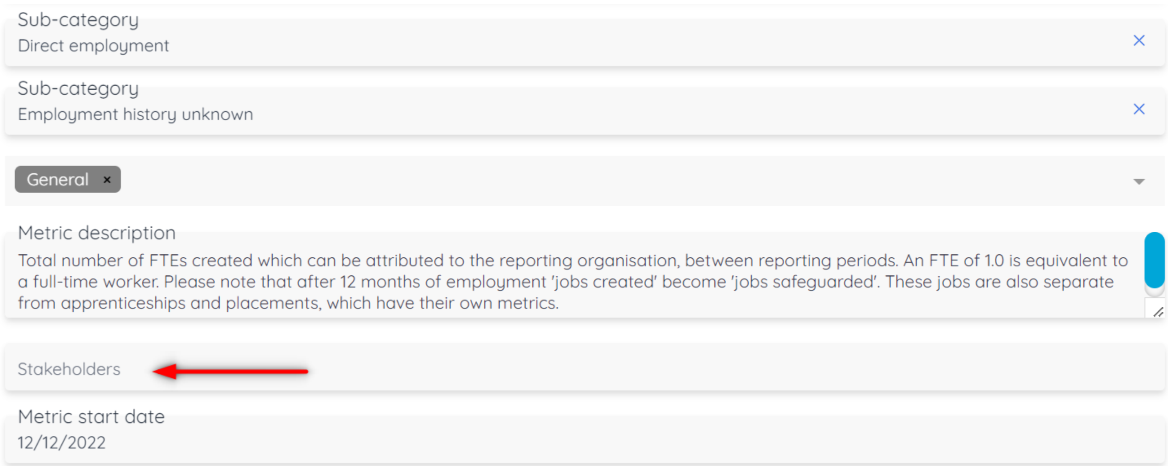


Once you have entered the employment history for your job creation metric I have chosen ‘Employment history unknown’ in this example. You will then also need to select some characteristics for the type of person you are looking to hire. You will need to select the blank sub-category field as shown highlighted with an arrow in the below image.

Once you've clicked this field a list of characteristics will appear for the type of person you are looking to hire. These range from 'General' and 'Care leaver' through to 'Ex-offender' and 'Formerly homeless' as you can see in the image below. If you are unsure of the characteristics of the person who you will be looking to hire, you can use the 'general' category at the top of the list. I will be selecting the 'General' characteristics in this example. You can also select multiple characteristics from the drop-down list if needed.



Once you have selected the characteristics, you can finally enter how many jobs you are looking to create, as shown in this example. For other metrics such as volunteering you will be able to enter your target number of hours or if you are looking at carbon reduction you would enter number of Tonnes reduced etc. The label above the field will change to showcase this depending on the metric you have chosen. You can see in the image below we have highlighted this field with a red arrow, it displays 'Stakeholders' as we are looking at job creation in this example.



Simply enter your target in the field labelled ‘Stakeholders’. In this example it will be Full Time Equivalents (FTE) as you can see from the ‘Metric description’ in the image above. If you ever need any additional information about any of our metrics, please refer to the National Social Value Standard (SVS) guide and list of metrics that can be downloaded from the SVS website. The links are provided in section 16. Download links.

In this example I will set a target for 1 stakeholder. Once you’ve set your target there are a few more options you can either decide to change or leave as they are, these are highlighted with red arrows in the image below.

These three fields are the ‘Metric start date’, ‘Metric end date’, and ‘Metric duration’. They are all pre-populated by the activity start and end date, which are set in the activity details section. I chose a 12-month period, so when I select any metric the start/end date and the duration will be pre-selected as 12 months as shown in the above image.

To change the ‘Metric Duration’ simply click on either the ‘Metric start date’ or ‘Metric end date’ field and from the calendar pop-up change the dates as desired. The ‘Metric Duration’ will then automatically update to

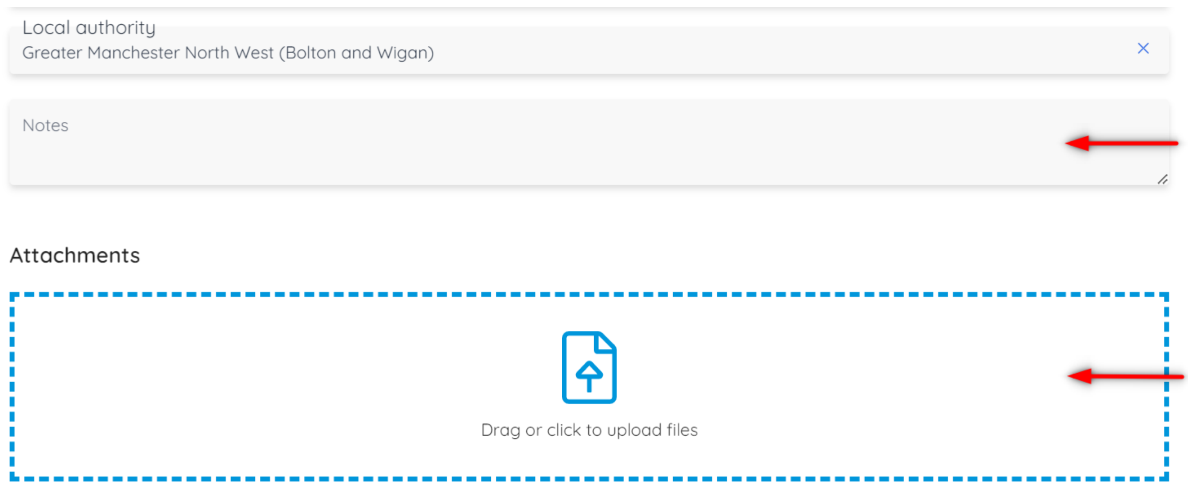
show the correct duration from the dates chosen as you can see in the previous image.

You can then amend the location of your metric if needed, similarly to the metric start and end date. The location of your metric will be predetermined by the location you set up in the activity details.

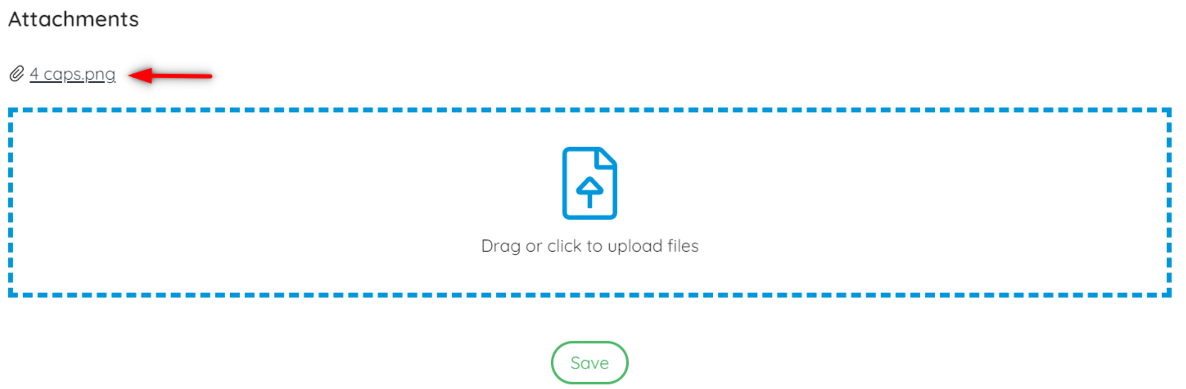
As you can see in the example image below, the three red arrows point to the ‘Region’, ‘Sub-region’ and ‘Local Authority’ that was entered up during the ‘Activity details’. You can leave these as they are if your target metric is based in this area.

In the example I am using today I’m looking to set a target for employing 1 person as per the previous instructions. My activity is based in the ‘Local authority’ of ‘Greater Manchester North West (Bolton & Wigan) but you may be looking to hire someone for a different ‘Local authority’. Simply click on the ‘Local Authority’ field and from the drop-down list choose the area you are aiming to hire the person from. There is no need to change this if you are looking to hire from the same area as where your activity is based. As mentioned previously all locations have regional weighting for metric values depending on the level of deprivation.

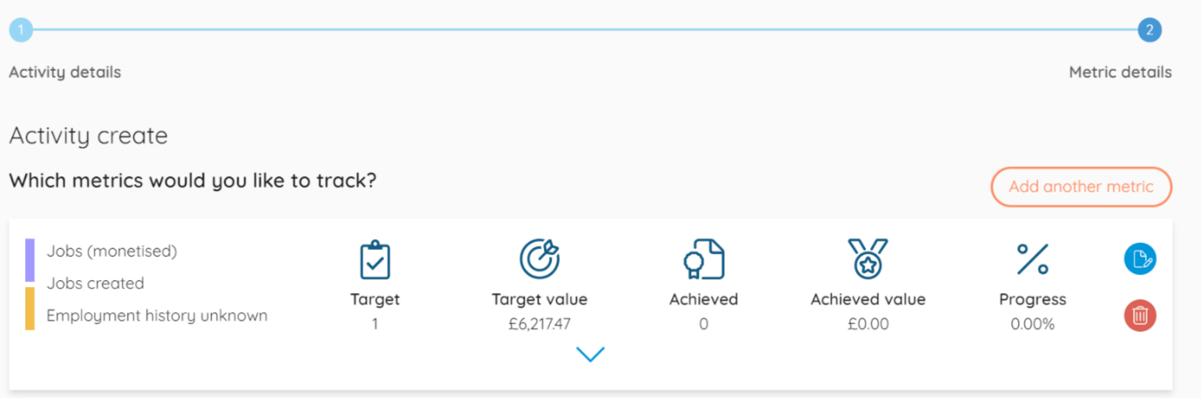
Once you have sorted the location of your metric, the last two sections before we can save our target are to leave notes and attach any evidence. As you can see highlighted with red arrows below, the notes section is a large text box for you to add any additional notes to your target / metric. These notes can be seen by any colleagues using the system. You can also attach evidence to support your metric.



The evidence section is straight forward to use, simply drag a file into the blue field or you can click on the blue field to search through your PC to attach a file. If you have clicked on the evidence section to search your PC, once you've selected the evidence from your files click open and the data will save against your metric as shown in the image below highlighted with an arrow.

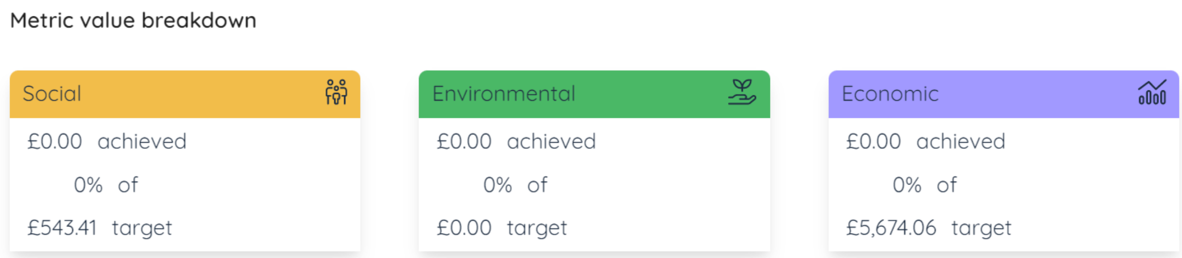


Once you've finished adding evidence to your metric (Please note it's not a requirement to attach evidence but we do recommend it where possible) simply click the green save button underneath the evidence section. The software will do the heavy lifting and calculate the social value your target metric would create if you were to complete the metric. The metric will be saved to your activity as you can see in my example in the image below.



Now that the metric is saved to the activity, you can see the target output, target social value that would be generated. You also have 'Achieved Output', 'Achieved Value' and 'Progress towards target %'. These columns are blank and will only show value once data has been inputted against the metric, for instructions on how to do this refer to section [9.2.2 How to add data against a metric].

You can see on the far-left hand-side of the metric that there will be either one or two colours. In the example above we can see there is a purple and yellow line. If you were to open the metric again by clicking the downward pointing blue arrow at the bottom of the metric, you can see a breakdown of the target value and achieved value relating to each area as shown in the example below. These colours represent the impact relating to either Social (Yellow), Environmental (Green) or Economic (Purple).



There is no limit to the number of metrics/targets you can add to your activity. To begin adding another metric simply click the orange 'Add another metric' button in the top right corner of the screen.

To save the activity click the green 'Save' button at the bottom of the page.

If you need to delete or edit your metric, please refer to Section [9.2.3 How to edit/delete a metric.] Once you have finished adding metrics to your monitor activity, simply click the green 'Save' button at the bottom of the screen and your activity will be saved. You can now begin to enter data against your target metrics, for instructions on how to do this refer to Section [9.2.2 How to add data against a metric].

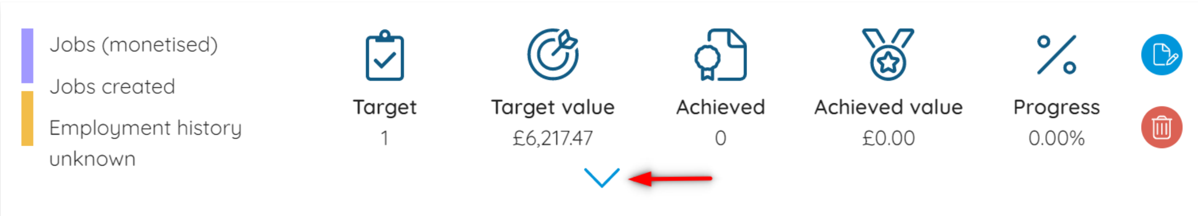
If you need to progress your activity from a monitor activity to an evaluate project so you can see can complete the activity and see the final results of your project, then move onto section 9.3 Progressing the activity to evaluation stage. Only do this if the activity has now gone live as you won't be able to return the activity to the monitor stage once this has progressed.

If you need to access a report to showcase your targets before entering data against them, then please refer to section 11.3.1 How to export a report (Excel, PDF & Word)

9.2.2 How to add data against a metric.

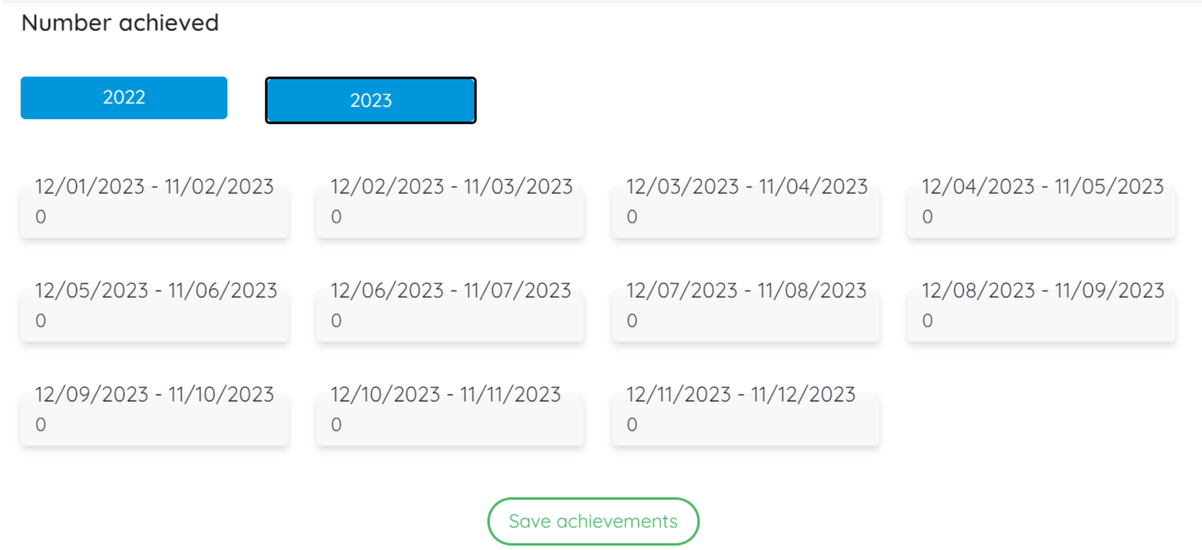
Now that you've set your target metrics for your monitor activity, you can begin to track your real-life data against your initial targets. Depending on which reporting period you chose when setting up your activity, there will either be monthly or quarterly reporting fields. I will show examples of both reporting periods.

Locate the metric you wish to enter data against from the 'Metric details' page, on the metric click the blue downwards facing arrow in the middle at the bottom of your chosen metric as shown in the image below.

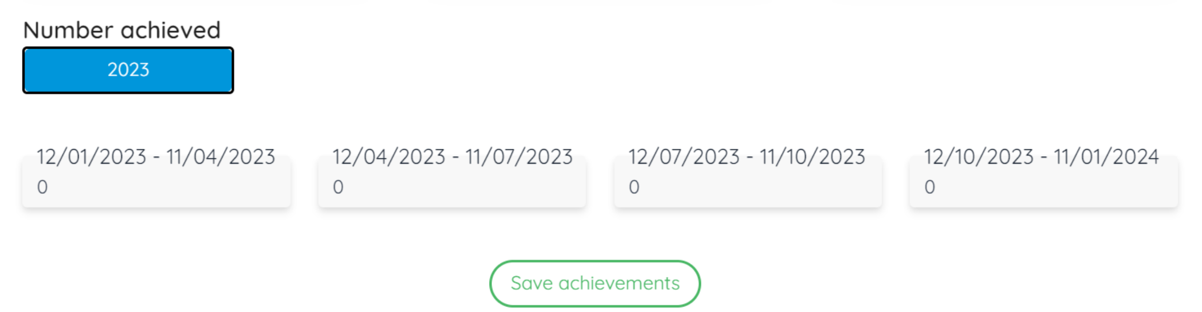


Once you click the blue arrow, the details of your metric will open below and you can begin to add data against your target. In the example used here we set a target to create 1 job in the local area for a general position with their employment history unknown. We can now enter the month or quarter we hired someone and created the job, you can also update their characteristics and job history if you now have this information.

To enter data against your metric to showcase your real-life impact. Once you've opened your specific metric details as described in the last paragraph, scroll down to where it says 'Number achieved' as shown in the image below. Depending on the length of the activity you will have multiple year selectors which are the blue buttons at the top labelled with years such as '2022', '2023' etc. Then just below you will have your data entry fields which will show the dates of each month or quarter for you to enter data against. The first example below shows a monthly reporting period.

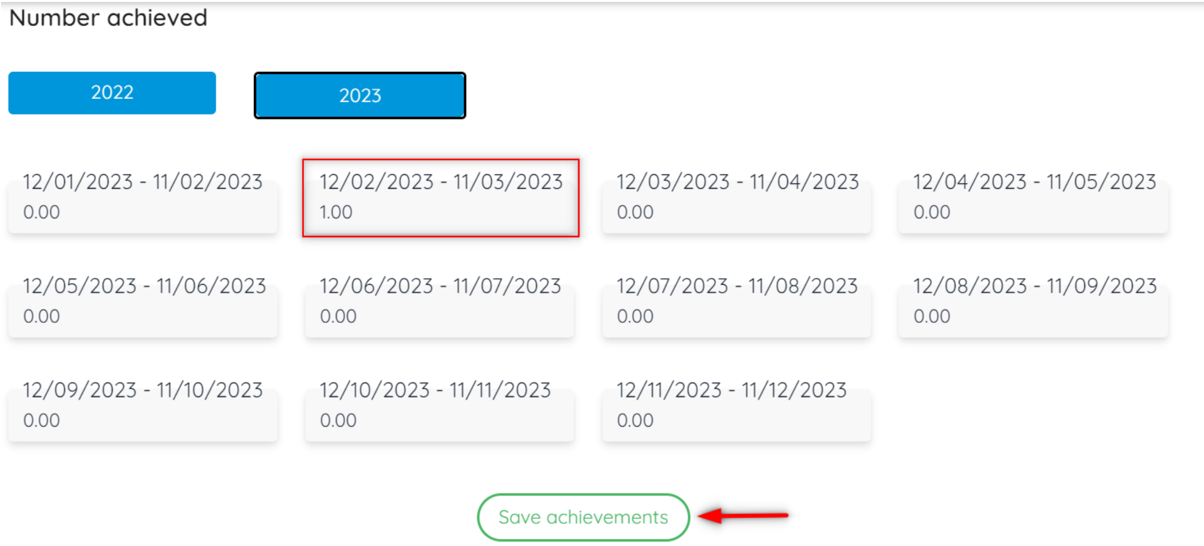


This second example shows a quarterly reporting period.

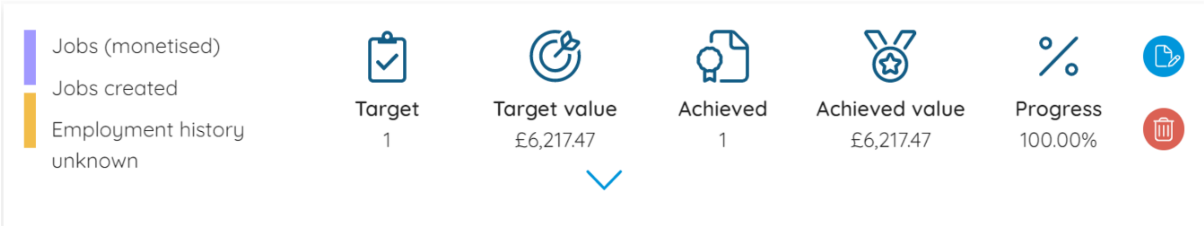


Simply, click the year you wish to enter data for. Then choose the correct month or quarter and enter the relevant data in this field. In the example I'm using we set a target of creating one job in the local area. We are in the monitoring stage so we can live track our data against targets so I will need to enter in the month that I hired this person.

As you can see in the example below, I have entered in the field labelled 12/02/2023 – 11/03/2023 that I have hired this person in this particular month. Once you have entered your data scroll down and click the green 'Save achievements' button and your data will be saved against your metric. We recommend when adding data against a metric, scroll down and save any evidence to the metric to support your data.



Once you have added your data and saved the achievements, the activity will update and your metric will now show value and data in the achieved columns of your metric as you can see in the example below.



To edit or delete any data you've added against a metric, simply follow the same steps above and either remove or change the data you have added against the specific month/quarter.

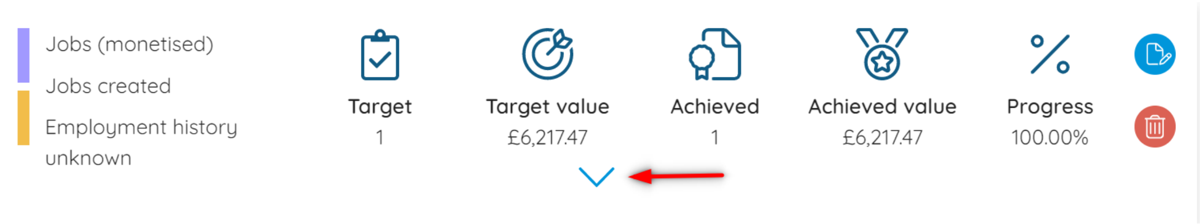
Once you've entered data against a metric you can see this data broken down on the activity dashboard, for an overview of the report and instructions on how to download the report please refer to section [11.3 Activity dashboard overview (Monitor)](#)

If you have an activity that has come to an end and you want to progress it to the final evaluation stage then refer to [section 9.3 Progressing the activity to evaluation stage.](#)

9.2.3 How to edit/delete a metric.

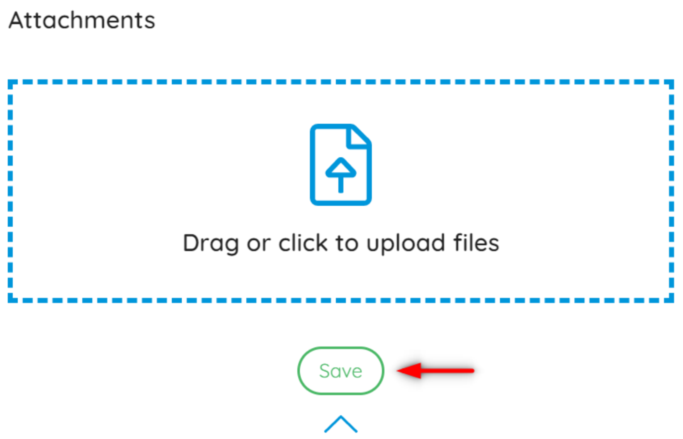
This section will quickly cover how to edit or delete a metric once it has been added to an activity.

To edit a metric, click the blue downward arrow at the bottom of the metric you want to edit, as you can see in the example below.



Once you click the arrow the metric details will open just below, and you can make edits to any of the fields. For instructions on how to fill any of the fields in refer to section 9.2.1 How to add a target/metric.

Once you've made the required edits, to the metric details, scroll to the bottom of the fields and click the green 'Save' button as shown in the image below.



Your updates to the metric will then be recalculated.

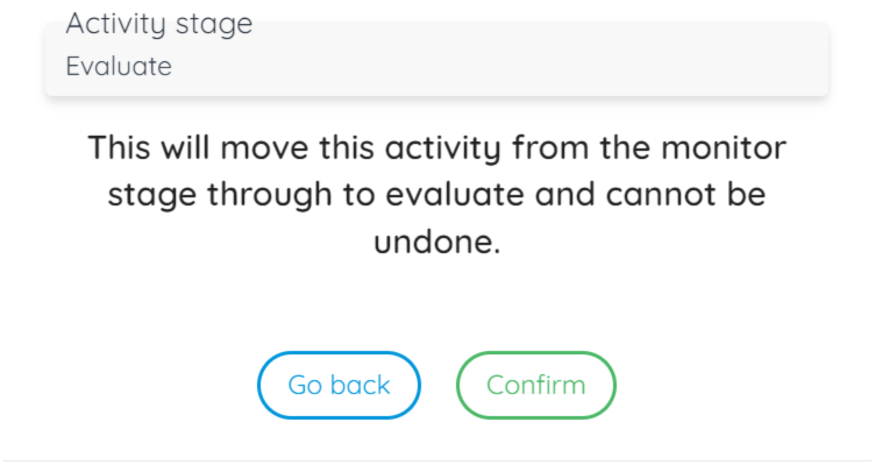
To delete a metric, simply locate the metric you wish to remove from the list on the 'metric details' page. On the far right of the metric there will be a red bin icon (see image below), click the icon and your metric will be deleted from your activity.

9.3 Progressing the activity to evaluation stage.

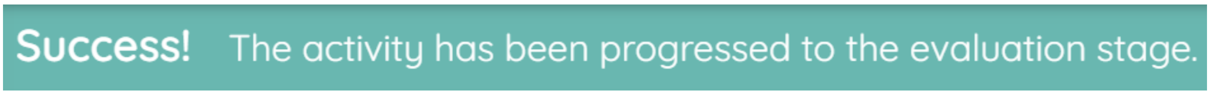
Progressing your activity from 'Monitor' to 'Evaluation' can be used when the activity is completed. You can use the evaluation stage to finalise the results of your activity, you then can pull off a final report to showcase your achieved outputs against your initial targets.

To progress the activity, go to either the ‘Activity details’ page or the ‘Metric details’ page and scroll right down to the bottom. You will see there are three buttons to choose from ‘Go back’, ‘Edit activity’ and the option you will need to choose ‘Progress activity’ as highlighted in the image below.

Once you click progress activity a pop-up will appear, advising that ‘This will move this activity from the monitor stage through to evaluate and cannot be undone’ The evaluate stage has already been chosen as you can only move a monitor activity to evaluate as you can see in the example below. Simply click the green ‘Confirm’ button at the bottom of the field to progress.



The activity will then be progressed through and turned into a evaluate activity. You will receive a confirmation message across the top of your screen advising ‘Success! The activity has been progressed to the evaluation stage.’ As shown in the example screenshot below.



You will then be redirected to the ‘Activity details’ page which will have been pulled through from the monitor stage, so you don’t have to re-enter any information.

Now that your activity is in the evaluation stage, all your data that you entered against your metrics in the monitor stage has been pulled through and will now show as achieved under metric details.

If you missed any metrics in the monitor stage, you could still enter them in the evaluate stage. You will only have to enter what you have achieved when doing this. The process is the same as adding metrics in the forecast stage. For full instructions on how to add metrics at the evaluate stage then please refer to section 10.2.1 How to add a metric.

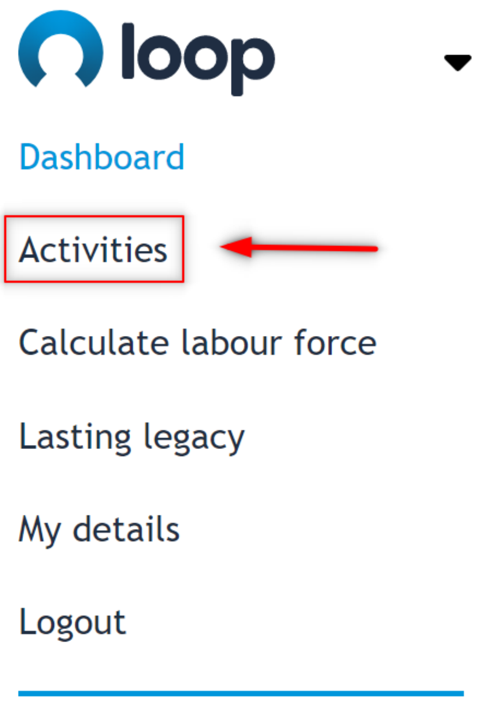
If you want to access and download a report from your evaluate project, please refer to section 11.4.1 How to export a report (Excel, PDF & Word).

10. How to create an activity - Evaluation

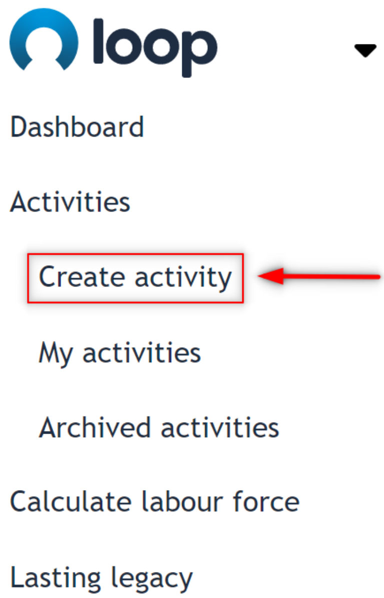
The next few sections will cover how to create an activity and input metrics at the Evaluate stage. For a full explanation of what the evaluation stage of an activity is, please refer to Section 3. Glossary of Terms.

To begin with, navigate to the main tool bar. You can do this by clicking the four blue lines in the top left corner of the software as shown highlighted in red in the image below.

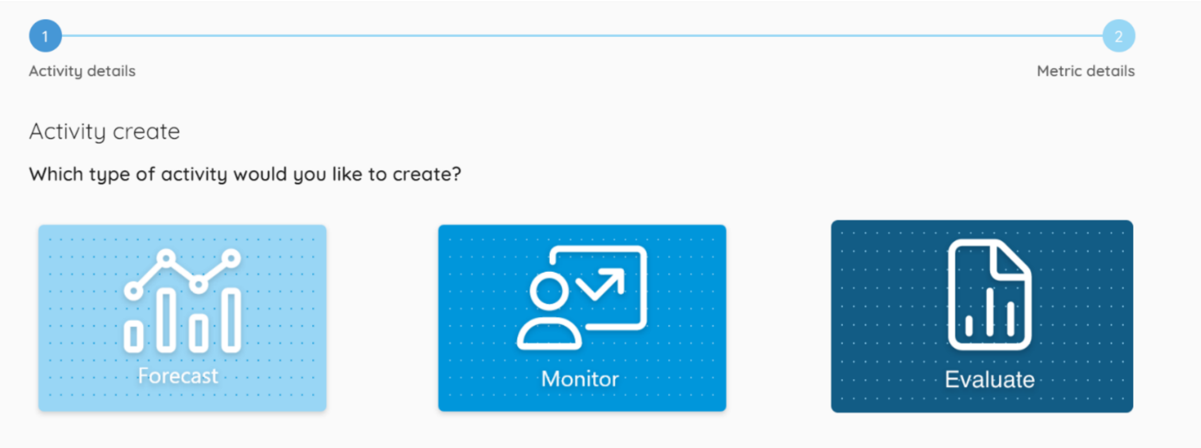
The main tool bar will then appear on the left-hand side of the screen, from here click the ‘Activities’ tab as shown with the red arrow in the image below.



Once you've clicked activities three more options will appear below, these options will be 'Create activity', 'My Activities' and 'Archived activities'. Select the first option labelled 'Create activity' as highlighted in the image below.



You will be taken through to the activity page (Image below) to choose which stage of an activity you wish to set up.



In this section we will be going through an 'Evaluate' activity. Once you click the evaluate tile, the 'Activity Details' section will appear underneath. The next section will cover the activity details showing you how to fill in all required fields.

10.1 Activity Details

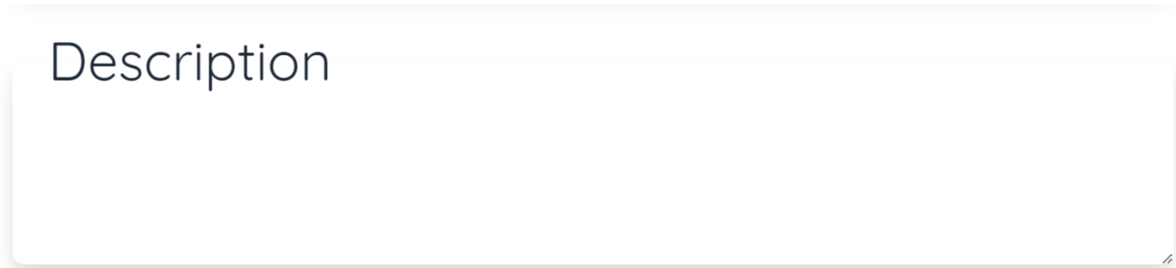
Once you have chosen an 'Evaluate' activity and the activity details section has appeared (as discussed in the previous section 9. How To Create an Activity – Monitor then you can start to fill in the details of the activity you are evaluating as shown below.

The first field is the 'Activity name', this will be the main name of your activity such as 'Westfield Redevelopment' or 'Christmas Community Initiative' etc. An example is shown below.

You can also use this field for any internal reference systems you might use within your organisation. Under the 'My Activities' section when searching through your activities, anything within the 'Activity name' can be searched for. So, for example I have used 'Client A' as a basic reference, I will now be able to search through my activities for 'Client A' to save on time. This information will also be displayed in the Activity report.

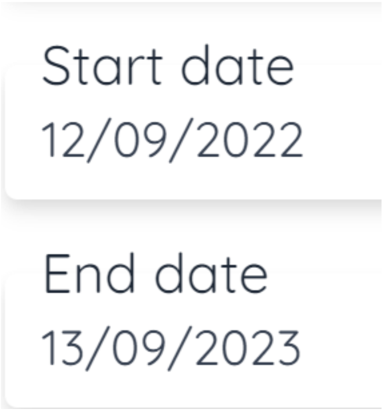
Just below your 'Activity Name' is a field labelled 'Unique reference' and will allow you to label your project with any internal reference number being used for your activity.

Just below your 'Activity Name' is a larger text box labelled 'Description' to add additional information for your activity as seen in the image below.

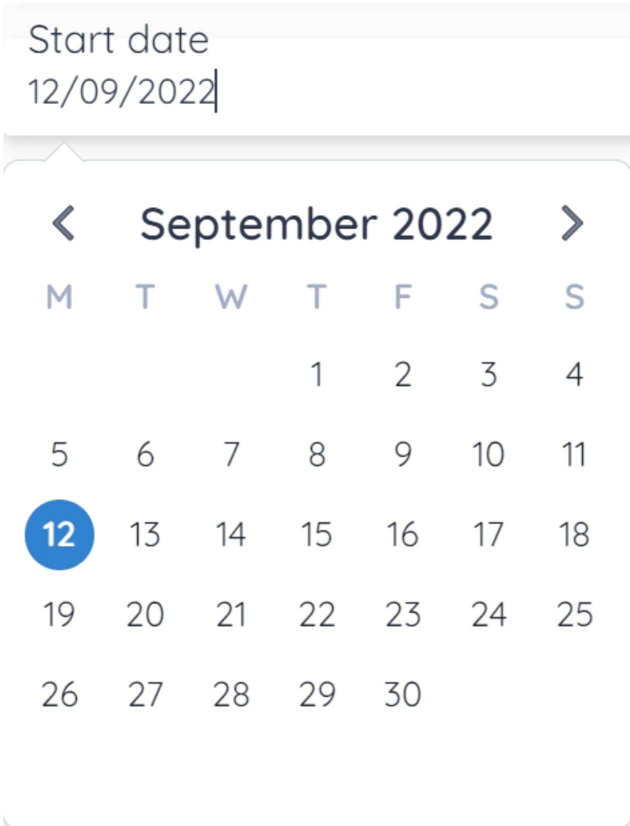


You can use this field to add additional information about the type of activity that is being carried out and any other useful information. In the bottom right corner of the field are two diagonal black lines that can be used to adjust the size of the description box.

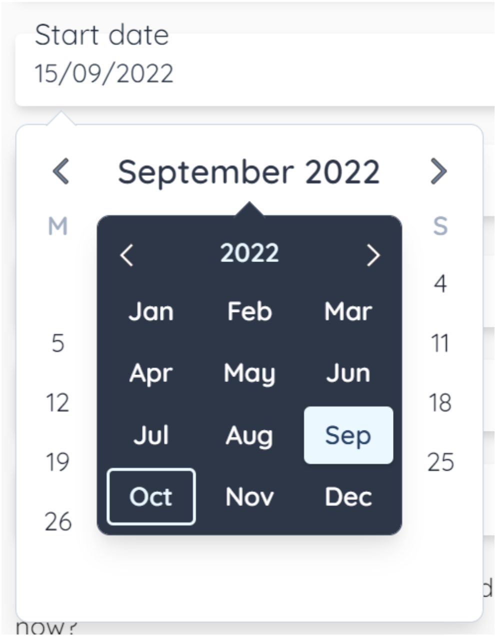
Once you've completed the description, the next two fields to fill in are the 'Start Date' and 'End Date'. You can see in the image below that the system automatically selects whatever today's date is for the start date and 12 months later as the end date.



To update either the start or the end date, simply click on the field for the date you wish to change. A calendar will then appear for you to be able to select a date as you can see in the image below.



To quickly change the month or year of the calendar, click on where it says 'September 2022' in the example above. Another pop up will appear as shown in the image below, from here you can quickly select a month for that year or change between years.



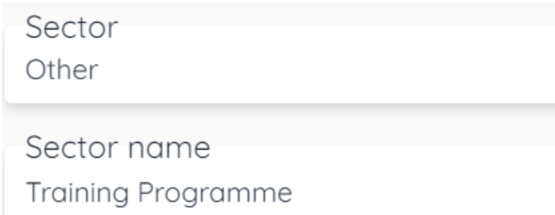
The exact same process can be used for amending the ‘End Date’.

Once you’ve filled in your start and end date, you need to enter your ‘Activity cost / spend’ in the field just below, as shown by the example of £100,000 In the image below.

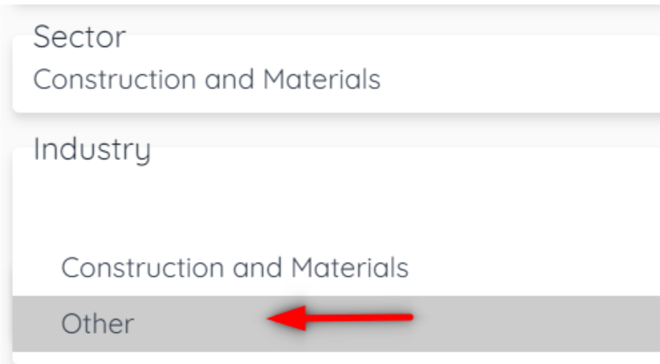
Once you’ve entered the ‘Activity cost / spend’, you will need to enter the Industry and Sector in which your activity is based in. The system has some preset choices as well as the ability to create your own industries and sectors not covered in the presets.

Click on the field labelled ‘Sector’ and a drop down will appear as shown in the image below. There are 7 preset sectors ranging from the ‘Built Environment’ to ‘Waste & Utilities’. The last option labelled ‘Other’ allows you to create your own ‘Sector’ to label your activity with.

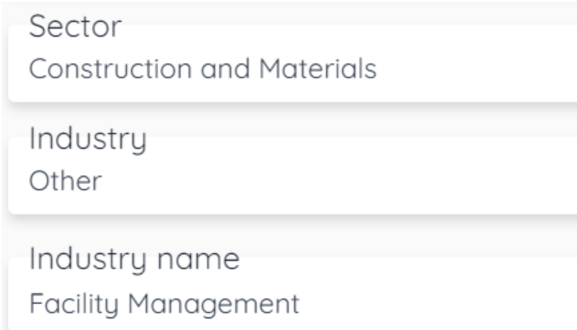
Click ‘Other’ and another field will appear below labelled ‘Sector name’ , simply enter the name of the sector you wish to create that isn’t in the list such as ‘Telecommunications’ as shown in the example below.



You can also create your own bespoke ‘Industry’ under any of the predetermined sectors. Choose the sector you wish to create an industry under such as the ‘Built Environment’, then in the field underneath for ‘Industry’ choose the last option ‘Other’ as highlighted with the red arrow in the image below.



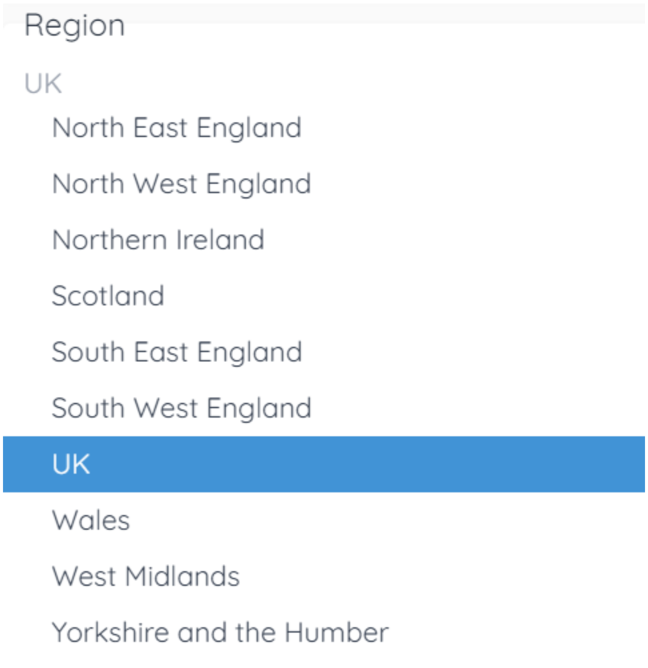
Another field will then appear underneath and here you can create your own ‘Industry Name’ such as Facility Management as shown in the example below.



Once you have selected / created your ‘Sector’ and ‘Industry’ you will need to set the geographic location of your activity.

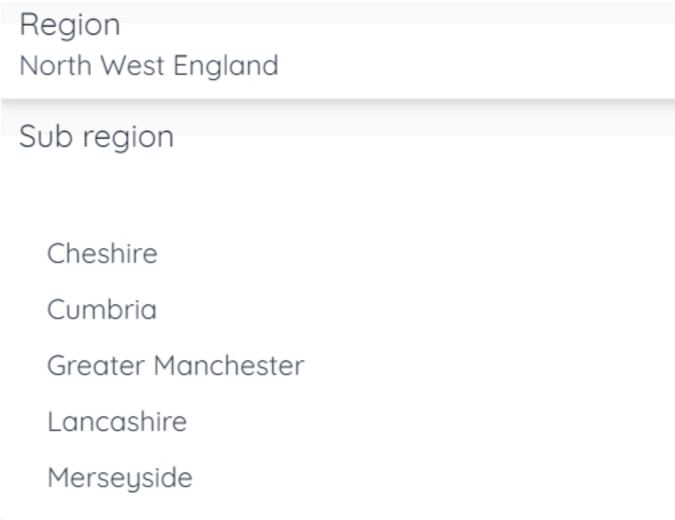
To choose your activity location, there are three levels for you to be able select from for the location. You have the option to choose a specific Region, Sub-Region, and Local authority. Each area has its own regional weighting depending on the level of deprivation for the Region, Sub-Region, or Local authority you choose. Meaning you will get different monetised values for the metrics depending on the location and level of deprivation for that area.

To begin, start by clicking the field labelled ‘Region’ and from the drop-down list choose the UK ‘Region’ in which your activity is taking place as shown in the example below.



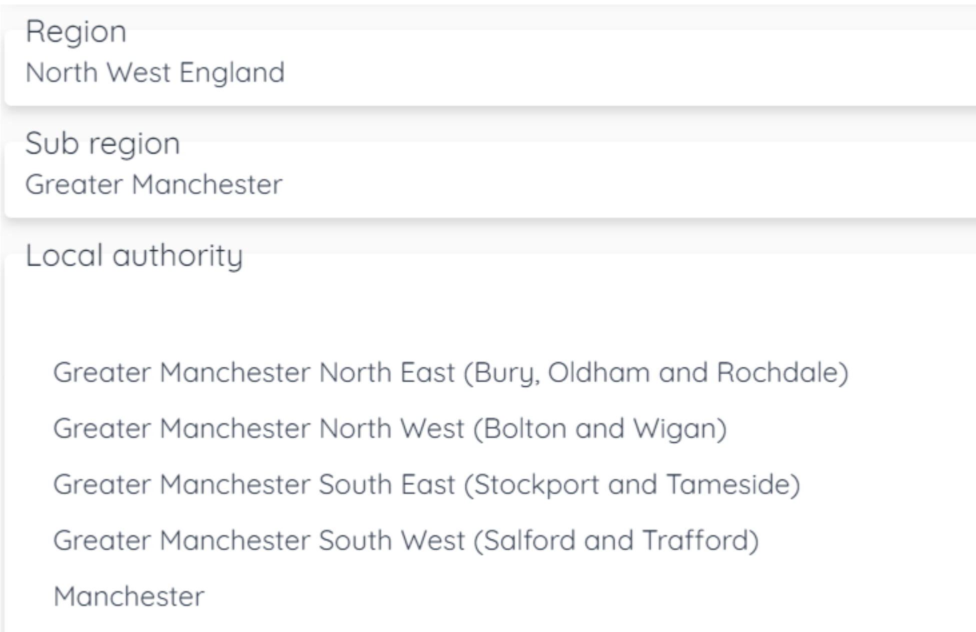
If you are carrying out a nationwide report, select the UK region as highlighted in blue in the image above. If your activity is for a specific location/region, choose it from the drop down list such as ‘North West England’. Once you have chosen a region you can then choose a ‘Sub-region’ from the region you have chosen as shown in the example below.

(if your activity is covering multiple areas within a region then don't select a 'Sub-Region' or 'Local Authority' and click 'Create' at the bottom of the page and move onto 'Section 9.2 Metric Details.

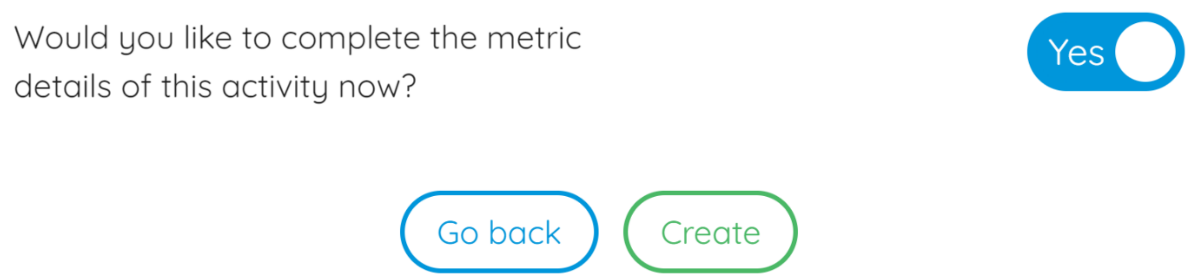


In this example I selected 'North West England' as our region, for the 'Sub-region' the list will show areas that relate to your chose region such as 'Cheshire', 'Cumbria', 'Greater Manchester' etc. as shown above.

Once you have chosen your desired 'Sub-region', click the 'Local authority' field and you will see the list of authorities that relate to your chosen 'Sub region' as shown in the example used below.

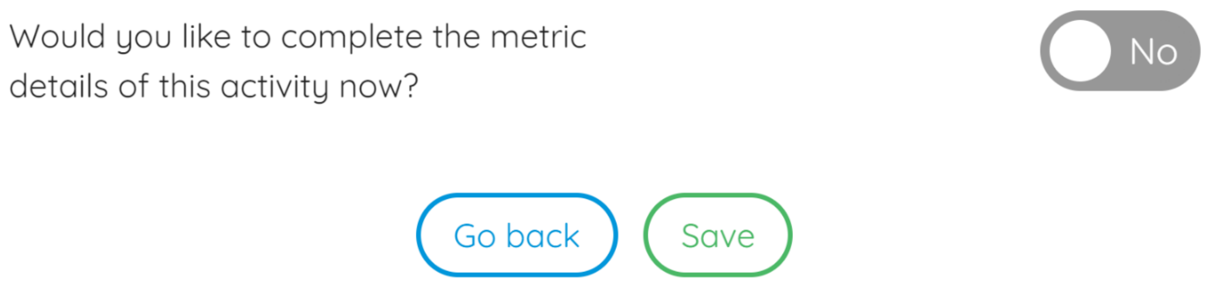


Once you've selected your desired authority click the green 'Create' button at the bottom of the screen to move onto completing the metric details of your activity forecast as shown in the example below.



You will then be redirected onto the metric details page to begin adding metrics/targets to your forecast project, please move on to the next Section 9.2 Metric Details. You can come back at any point to amend any of the activity details. However please be aware this may change the values of metrics if, for example, the end date is amended.

There is also the option to just set up the 'Activity details' page and come back and add metric details later. If you click the blue toggle labelled 'Yes', this will allow you to just save the activity and return later to add your metric details. Simply click the 'Yes' button and then green 'Save' button as shown below.



10.2 Metric Details

The metric details section of an evaluate activity allows you to enter metrics you have achieved during a certain project, activity, or initiative. You can then download a report in three different formats to showcase the social value you achieved during the length of the activity,

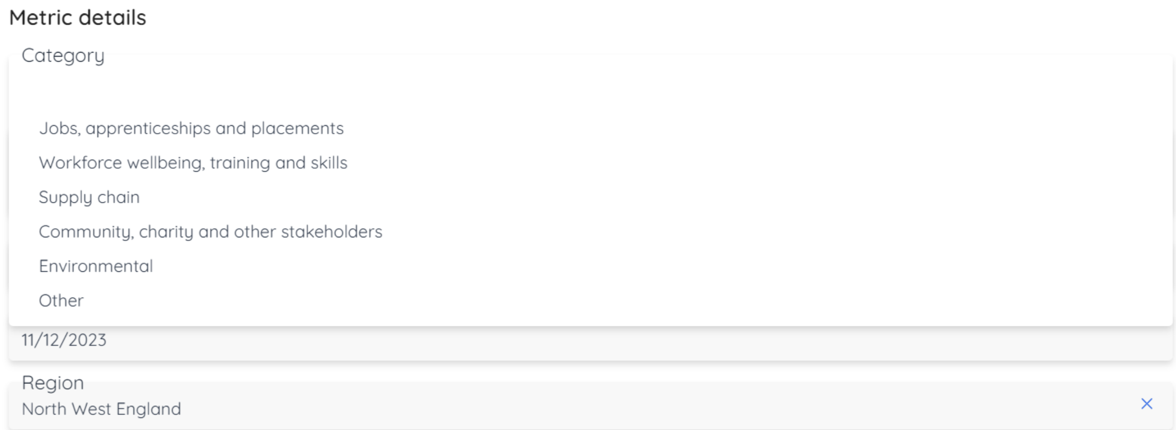
The next section will show you how to add an achieved metric to your activity.

10.2.1 How to add a metric.

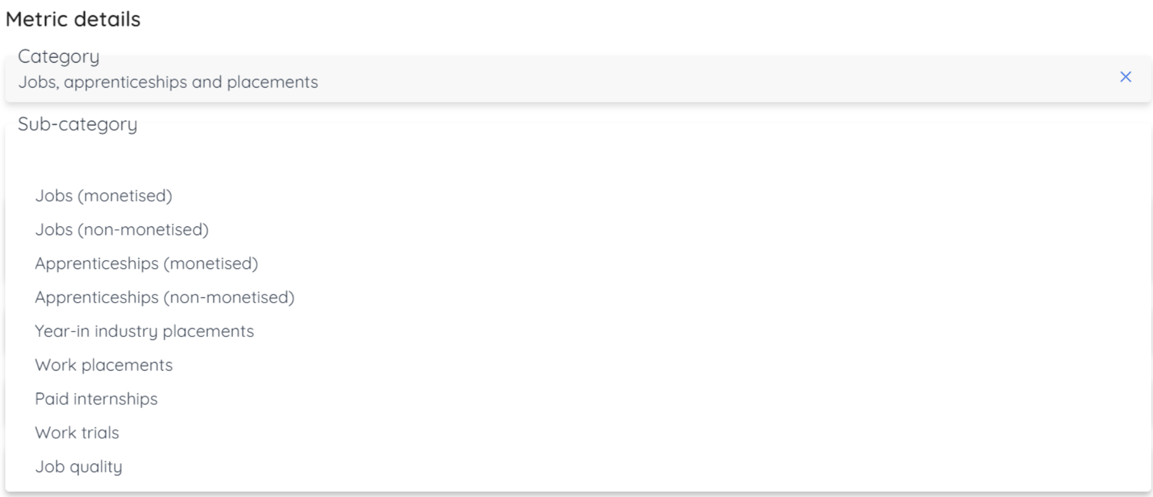
Once you've set up and saved the 'Activity details' as shown in section 9.1 Activity Details, you will be redirected to the 'Metric Details'. From here you can begin adding your achieved metrics as part of your evaluation activity, I have highlighted the first field that you need to select with an arrow in the image below.

Once you click the category field, a drop down will appear with 6 options for you to choose from as you can see in the image below. These categories separate our 800 metrics out into easily understandable categories such as 'Jobs, apprenticeships, and placements', 'Supply Chain' etc. These categories are explained in more detail in [Section 4. 'Methodology – National Social Value Standard'.]

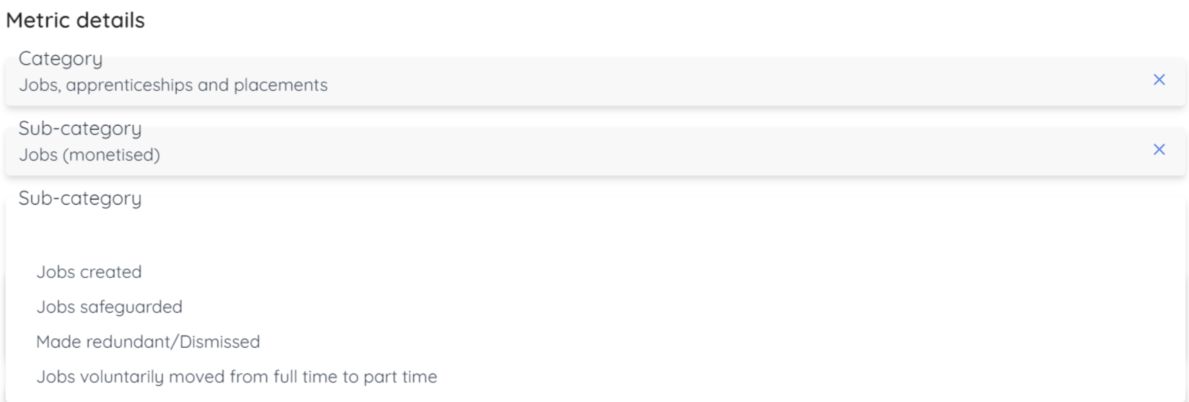
From the drop-down list simply choose the category you would like to select a metric from.



Once you've chosen your desired category, in this example we have chosen 'Jobs, apprenticeships and placements', the next step is you will need to select a sub-category which is the field just underneath. All the sub-categories will relate to your chosen main category. As you can see in the example below, we chose 'Jobs, apprenticeships and placements' as our main category and the sub-categories are 'Jobs (monetised), Jobs (non-monetised) etc.

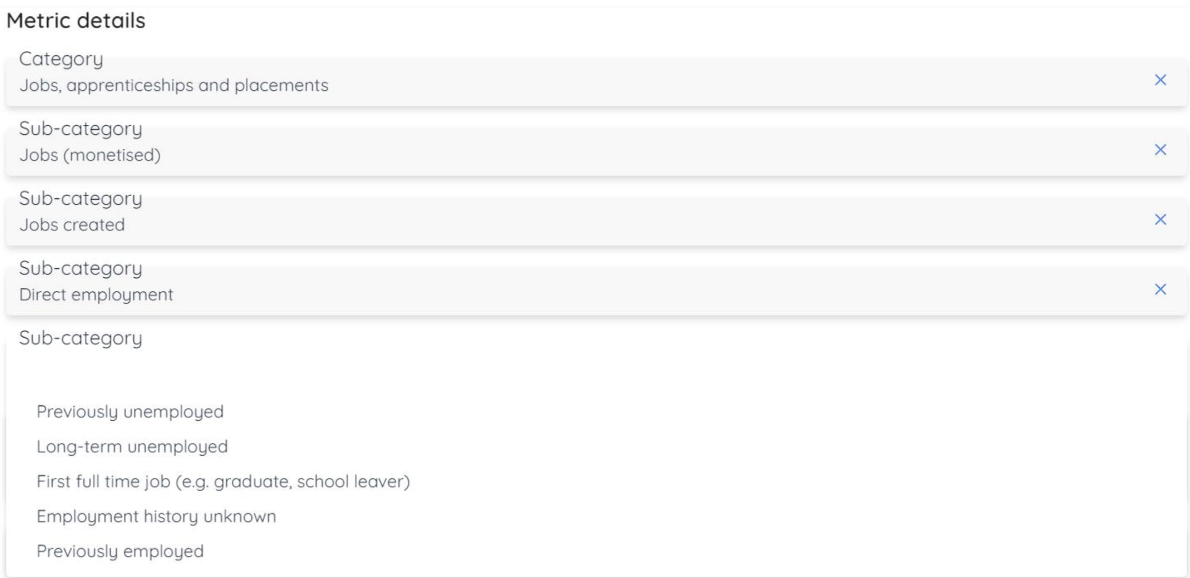


In this example we will be showing you how to enter a metric to showcase the creation of a job in the local area. We will be choosing the top sub-category 'Jobs (monetised)'. You will then need to choose a further sub-category this covers a range of options such as 'Jobs created', 'Jobs safeguarded', 'Made redundant/Dismissed' etc. as you can see in the image below. We will be choosing 'Jobs created' as we are looking to enter that we have created one job locally for this project.



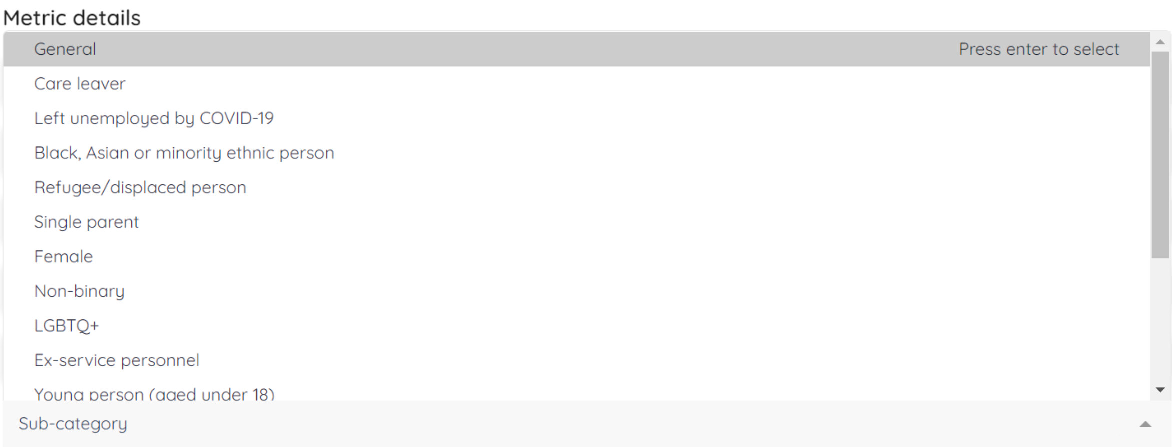
Once you have chosen the 'Jobs created' sub-category, another sub-category field will then appear below for you to choose whether the job that you have created was directly employed through your organisation or indirectly employed through your supply chain / sub-contractors. You can see this in the image below, for the purposes of this example we will be choosing direct employment.

Once you have chosen the employment type you will need to set the employment history for the job you have created. There are several different options such as ‘Previously unemployed’, ‘Long-term unemployed’ etc. There is also an option to choose ‘Employment history unknown’. In the case of not having this information available, simply choose ‘Employment history unknown’. You can see these options in the image below.



Once you have entered the employment history for your job creation metric, I have chosen ‘Employment history unknown’ in this example. You will then also need to select some characteristics for the type of person you hired. You will need to select the blank sub-category field as shown highlighted with an arrow in the below image.

Once you've clicked this field a list of characteristics will appear for the type of person you or the organisation have hired. These range from 'General' and 'Care leaver' through to 'Ex-offender' and 'Formerly homeless' as you can see in the image below. If you are unsure of the characteristics of the person who you have hired, you can use the 'general' category at the top of the list. I will be selecting the 'General' characteristics in this example. You can also select multiple characteristics from the drop-down list if needed.



Once you have selected the characteristics, you can finally enter how many jobs you have created, as shown in this example. For other metrics such as volunteering you will be able to enter the number of hours completed or if you are looking at carbon reduction you would enter number of Tonnes reduced etc. The label above the field will change to showcase this depending on the metric you have chosen. You can see in the image below we have highlighted this field with a red arrow, it displays 'Stakeholders' as we are looking at job creation in this example.

Simply enter your achieved output in the field labelled ‘Stakeholders’. In this example it will be Full Time Equivalents (FTE) as you can see from the ‘Metric description’ in the image above. If you ever need any additional information about any of our metrics, please refer to the National Social Value Standard (SVS) guide and list of metrics that can be downloaded from the SVS website. The links are provided in section 16. Download links.

In this example I will enter that we have created a job position for 1 stakeholder. Once you’ve entered your achieved output there are a few more options you can either decide to change or leave as they are, these are highlighted with red arrows in the image below.

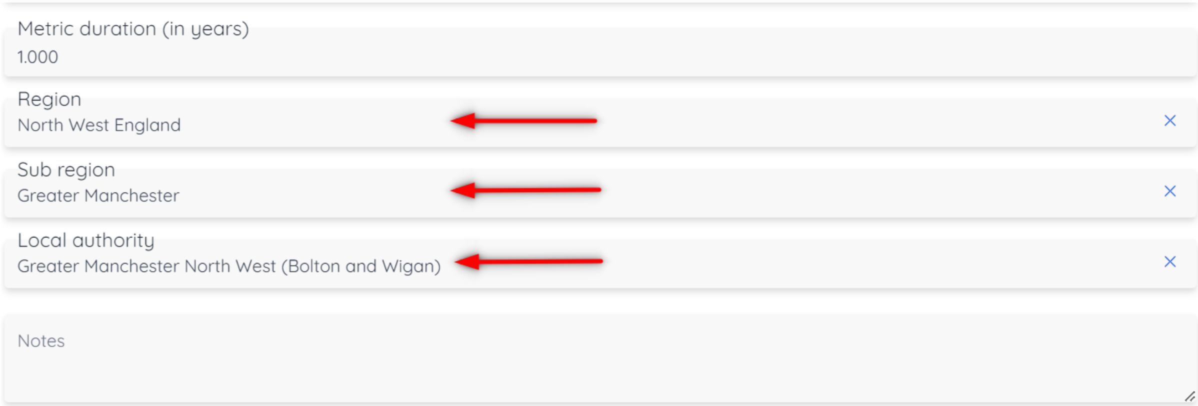
These three fields are the ‘Metric start date’, ‘Metric end date’, and ‘Metric duration’. They are all pre-populated by the activity start and end date, which are set during the activity details section. I chose a 12-month period, so when I select any metric the start/end date and the duration will be pre-selected as 12 months as shown in the above image.

To change the ‘Metric Duration’ simply click on either the ‘Metric start date’ or ‘Metric end date’ field and from the calendar pop-up change the dates as desired. The ‘Metric Duration’ will then automatically update to

show the correct duration from the dates chosen as you can see in the previous image.

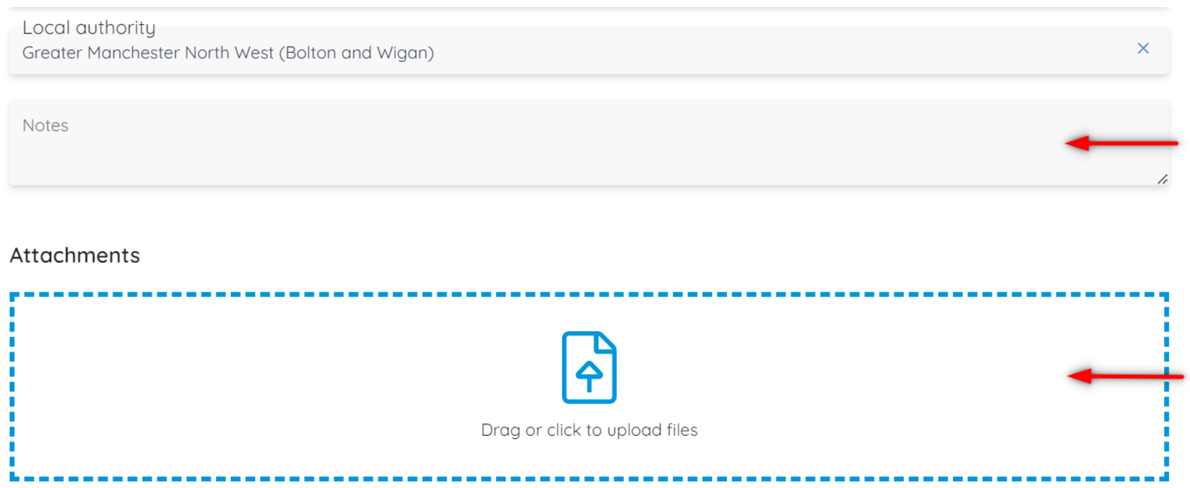
You can then amend the location of your metric if needed, similarly to the metric start and end date. The location of your metric will be predetermined by the location you set up in the activity details.

As you can see in the example image below, the three red arrows point to the 'Region', 'Sub-region' and 'Local Authority' that was entered up during the 'Activity details'. You can leave these as they are if your target metric is based in this area.

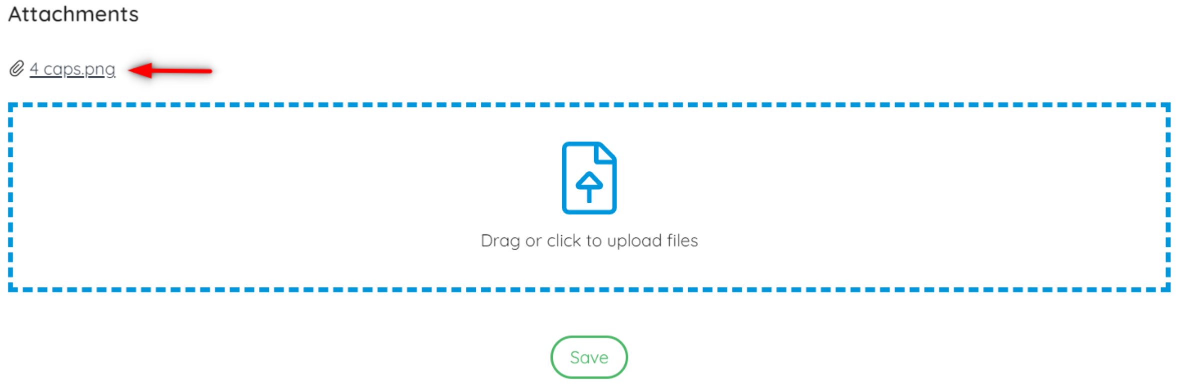


In the example I am using today I'm looking enter data to showcase the creation of a job position for 1 person as per the previous instructions. My activity is based in the 'Local authority' of 'Greater Manchester North West (Bolton & Wigan) but you may have hired someone from a different 'Local authority'. Simply click on the 'Local Authority' field and from the drop-down list choose the area hired the person from. There is no need to change this if you hired from the same area as where your activity is based. As mentioned previously all locations have regional weighting for metric values depending on the level of deprivation.

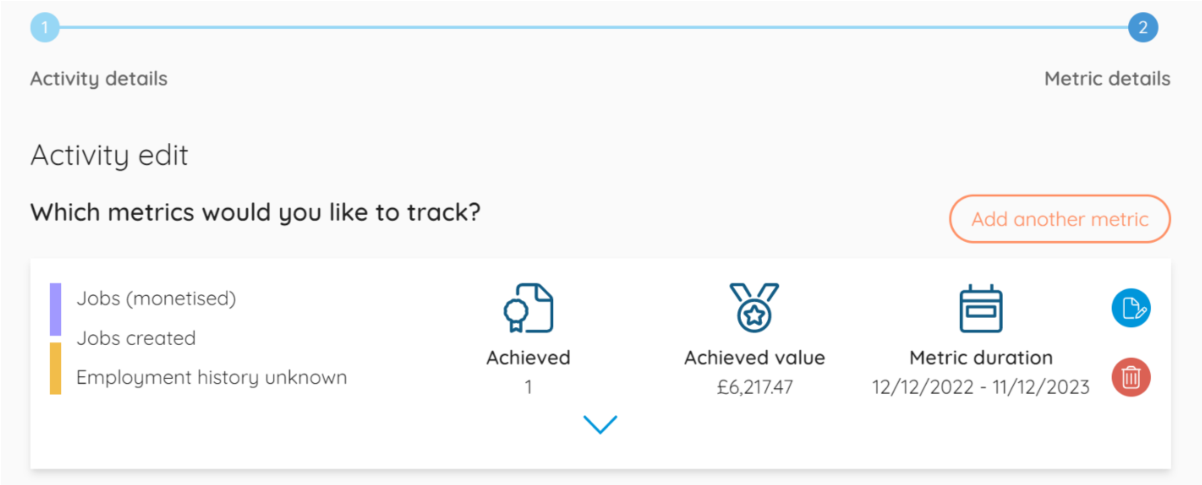
Once you have sorted the location of your metric the last two sections before we can save our target are to leave notes and attach any evidence. As you can see highlighted with red arrows below, the notes section is a large text box for you to add any additional notes to your metric. These notes can be seen by any colleagues using the system. You can also attach evidence to support your metric.



The evidence section is straight forward to use, simply drag a file into the blue field or you can click on the blue field to search through your PC to attach a file. If you have clicked on the evidence section to search your PC, once you've selected the evidence from your files click open and the data will save against your metric as shown in the image below highlighted with an arrow.

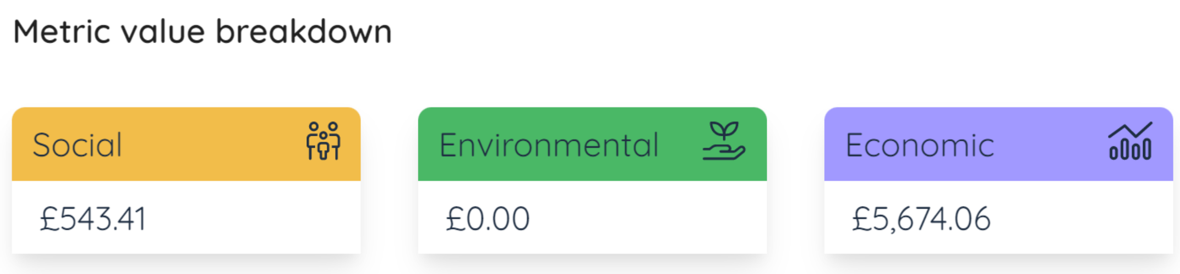


Once you've finished adding evidence to your metric (Please note it's not a requirement to attach evidence but we do recommend it where possible) simply click the green save button underneath the evidence section. The software will do the heavy lifting and calculate the social value your target metric would create if you were to complete the metric. The metric will be saved to your activity as you can see in my example in the image below.



Now that the metric is saved to the activity, you can see the achieved output, achieved social value that has been generated. You can also see the metric duration.

You can see on the far-left hand-side of the metric that there will be either one, two, or three colours. In the example above we can see there is a purple and yellow line. If you were to open the metric again by clicking the downward pointing blue arrow at the bottom of the metric, you can see a breakdown of the achieved value relating to each area as shown in the example below. These colours represent the impact relating to either Social (Yellow), Environmental (Green) or Economic (Purple).



There is no limit to the number of metrics/targets you can add to your activity. To begin adding another metric simply click the orange 'Add another metric' button in the top right corner of the screen as you can see in the example above and follow the same steps that we have just run through.

If you need to delete or edit your metric, please refer to Section 10.2.2 How to edit/delete a metric. Once you have finished adding metrics to your evaluation activity, simply click the green 'Save' button at the bottom of the screen and your activity will be saved as shown in the example below.

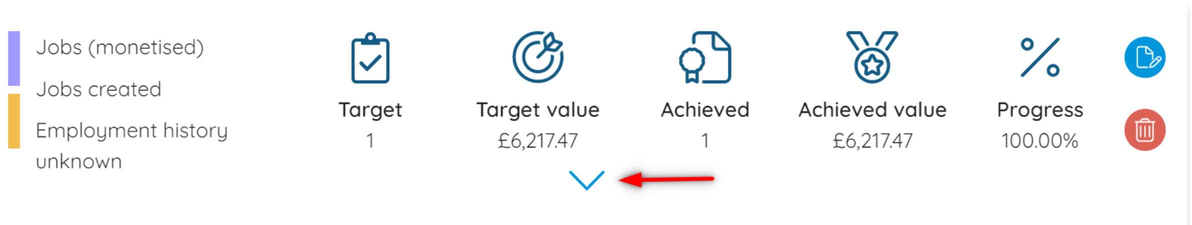
Once you click ‘Save’, your activity will be saved to the ‘My Activities’ page and you will be able to download a report in three different formats.

For step-by-step instructions on how to download your activity report please move onto section 11.4.1 How to export a report (Excel, PDF & Word).

10.2.2 How to edit/delete a metric.

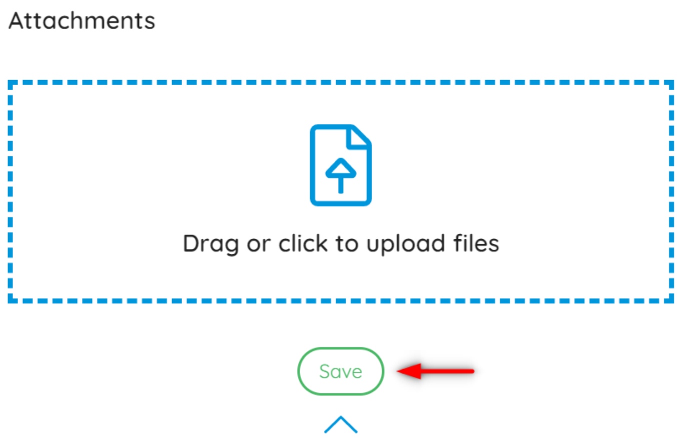
This section will quickly cover how to edit or delete a metric once it has been added to an activity.

To edit a metric, click the blue downward arrow at the bottom of the metric you want to edit, as you can see in the example below.



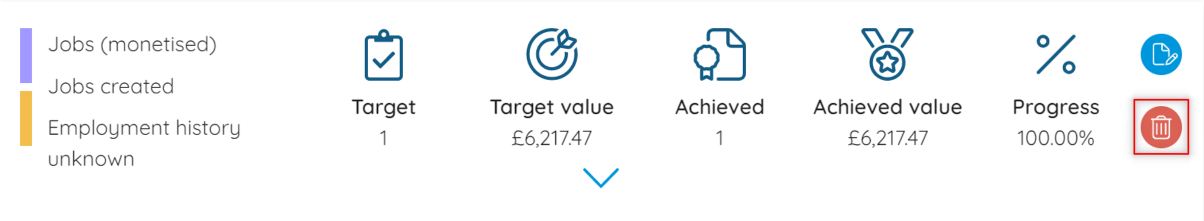
Once you click the arrow the metric details will open just below, and you can make edits to any of the fields. For instructions on how to fill any of the fields in refer to section 10.2.1 How to add a metric.

Once you’ve made the required edits, to the metric details, scroll to the bottom of the fields and click the green ‘Save’ button as shown in the image below.



Your updates to the metric will then be recalculated.

To delete a metric, simply locate the metric you wish to remove from the list on the 'metric details' page. On the far right of the metric there will be a red bin icon (see image below), click the icon and your metric will be deleted from your activity.



11. Dashboards / Exports

The following sections will explain the various types of dashboards within the tool, how to access them and how to export them to a variety of different formats such as PDF, Word, and Excel.

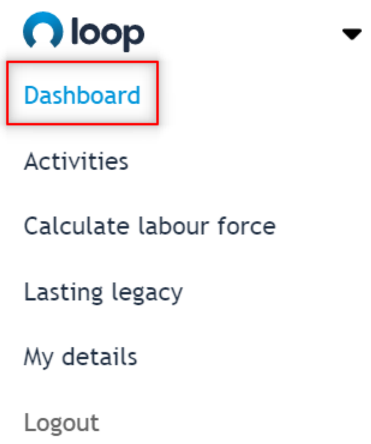
The dashboards and exports within the tool can be used to showcase the Social Value you have generated or plan to generate across a range of graphics and breakdowns. You can export your data against Loop's National Social Value Standard or several other Social Value frameworks such as the UK Government's 'Social Value Model' and the National TOM's.

The first section will look at the main dashboard, this dashboard can be seen as soon as you login into the tool and aggregates all your activities onto one main dashboard.

11.1 Main dashboard overview

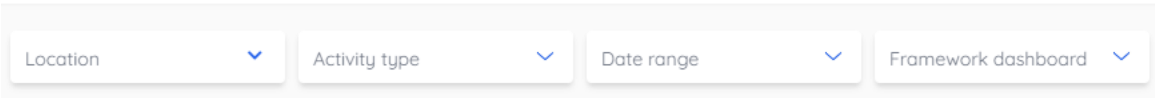
The main dashboard gives you an overview of all your activities within the system displayed in one easy to understand report. This section will give you an overview of the main dashboard in the platform, explaining what is displayed on the dashboard and how certain ratios and values are calculated.

There are two quick and easy ways to access the main dashboard. Firstly, when you log into the software you are automatically directed to the main dashboard when you log in. Alternatively, if you are in a different area in the platform, all you need to do is click the main tool bar which is 4 blue bars next to the Loop logo in the top left corner. Click the first option labelled 'Dashboard' as you can see in the image below.



Once you click ‘Dashboard’, you will be redirected to overview dashboard where you can see all your activities data aggregated onto one screen.

Across the top of the dashboard are several filters that can be used to change the view of data, you can see a screenshot of these below.

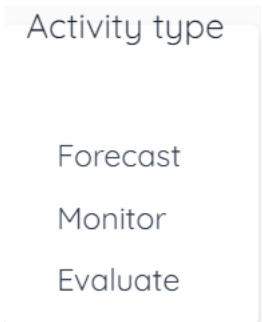


Firstly you can filter by ‘Location’, these locations will all relate to the geographic locations used when setting up your projects. Simply click the ‘Location’ field and a list of locations will appear for you to choose from as you can see in the image below. You can also type a location into the search bar at the top of the field.

Once you’ve chosen your desired location, the data displayed on the dashboard will update to show the social value from all activities in your chosen location. This filter is helpful if you need to showcase all the social value created within a certain region, sub-region or local authority to a client or stakeholder.

The next filter on the dashboard is the ‘Activity type’. The reason this filter is available is because as mentioned previously the main dashboard displays all of your activities data that includes all of your forecast, monitor and evaluate activities. This is important if you want to only show the social value you’ve created rather than including the forecasted social value as well.

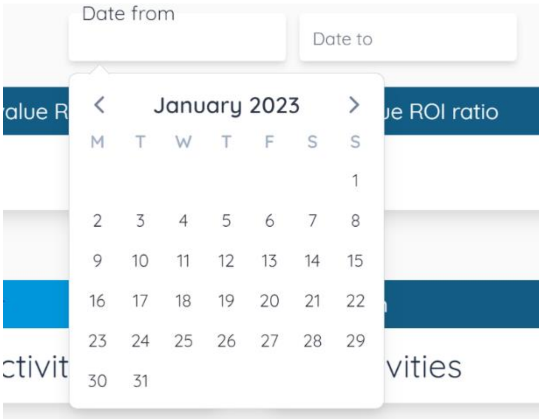
Simply click the field labelled ‘Activity type’ and from the drop down you can choose either forecast, monitor, or evaluate as you can see in the image below.



Once you select your ‘Activity type’ the dashboard will update to only show data from your chosen type. You can use multiple filters together on the main dashboard such as filtering all ‘Forecast’ activities in ‘Greater Manchester’.

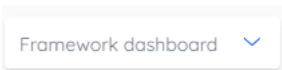
The next filter on the main dashboard is the ‘Date Range’ filter, this will allow you to filter all your activities by a number of preset date ranges. You have the ability to filter all your activities by the ‘Last 30 days’, the ‘Last 2 weeks’, the ‘Last week’ and also by any ‘Custom’ dates as you can see in the image below.

When choosing a custom date range, once you have chosen ‘Custom’ from the drop-down list two extra fields will appear just below labelled ‘Date from’ and ‘Date to’. Click on ‘Date from’ to begin with and a calendar will appear for you to choose a date as you can see in the image below.



Simply choose your desired start and end date using the calendar and the dashboard will add the date range filter as soon as you’ve selected the required dates.

The last filter on the main overview dashboard is the ‘Framework dashboard’ filter as you can see in the image below.

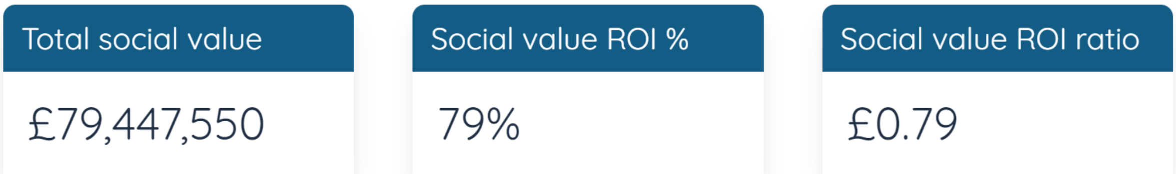


This allows you to align all your activities social value data against four well known frameworks and see how Loop’s National Social Value Standard (SVS) metrics that you’ve used map to the key themes on these other frameworks. To change to an alternative framework dashboard and see how your data aligns, click the ‘Framework dashboard’ and from the drop down choose your desired framework as you can see in the example below.

Simply choose the social value framework you wish to align your activity data against from the list and you will be redirected to your desired framework dashboard. For an overview of each alternative framework dashboard please refer to section [11.5 Alternative Framework Dashboard Reports.](#)

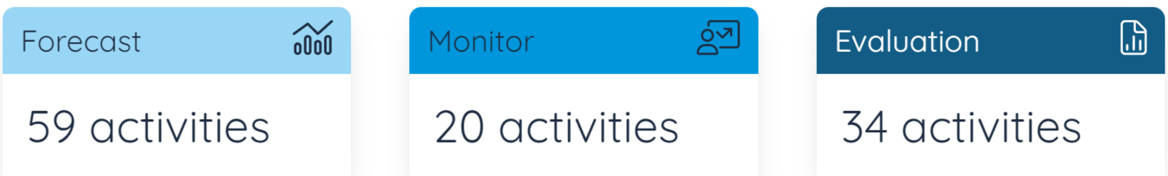
We will now run through the different breakdowns on the main dashboard explaining what is displayed and how it's calculated. **Please note any filters added to the dashboard will change data on all infographics.**

The first three breakdowns from left to right show the 'Total social value', the 'Social Value Return on Investment (ROI) %' and the 'Social value ROI ratio' for all your activities created in the system as shown in the example below. The 'Total social value' is straight forward and displays the social value from all your activities within the system.

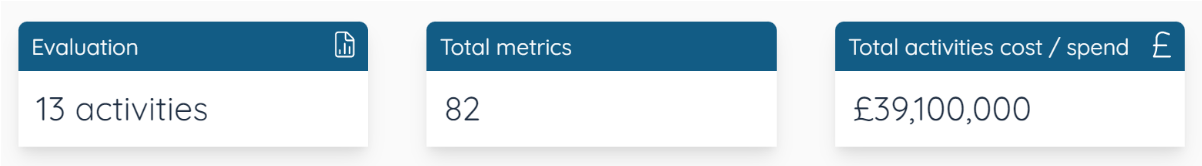


The 'Social value ROI %' and the 'Social value ROI ratio' display the return on investment from all your activities in two units. This is calculated by taking the total social value from all activities and dividing it by the overall spend on activities. In the example above, the total social value is roughly £79 million and the total activities spend is roughly £100 million. Therefore, the ROI for every £1 spent, £0.79, has been created in social value, which is a 79% return on investment.

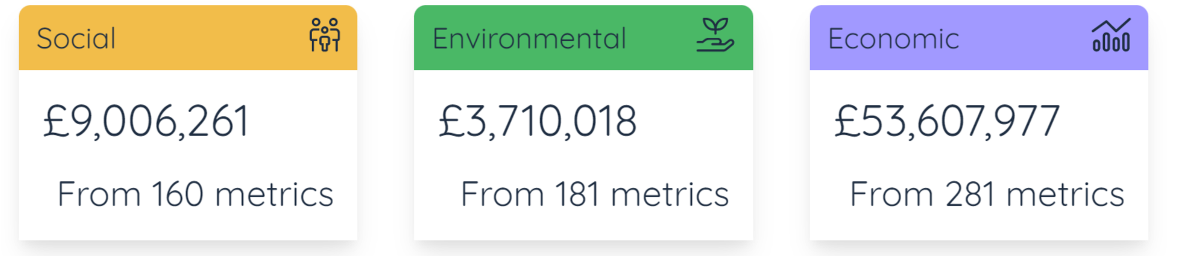
Moving down the dashboard, the next 3 graphics showcase the total number of forecast, monitor and evaluation activities that you've entered into the Loop platform. You can see an example of this below:



If you were to filter the dashboard to just show evaluation activities for example, then the three graphics above would automatically change. The forecast and monitor graphics will then be replaced by ‘Total metrics’ and ‘Total activities cost / spend £’ as you can see in the example below.



The next breakdown on the main dash showcases the value you’ve created against the three pillars of social value. It will display the social, environmental and economic impact of all of your activities. It also breaks down the number of metrics across all of your activities that relate to each impact area as you can see in the example below.

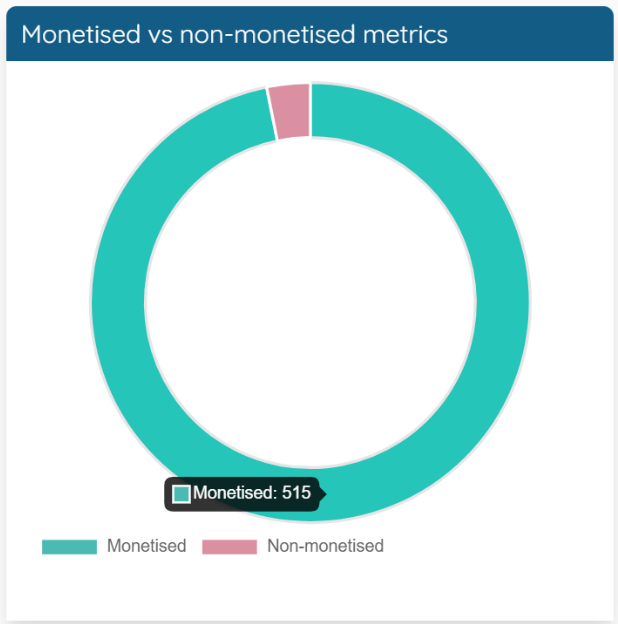


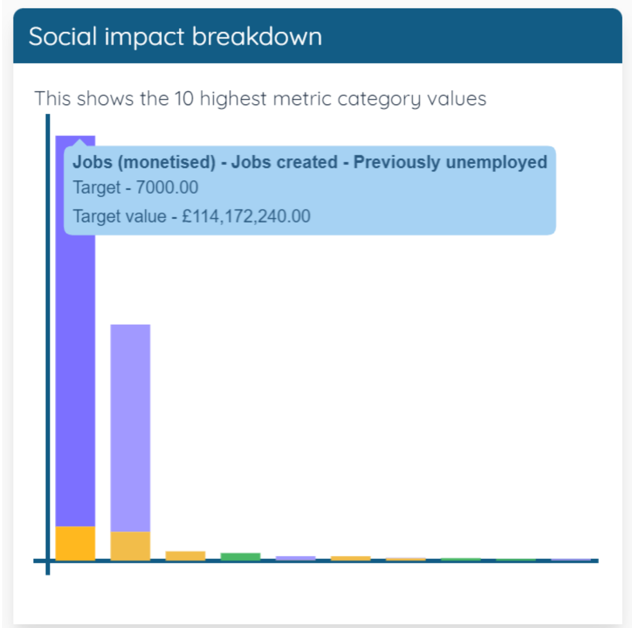
If we move past the social, environmental, and economic breakdown, there are 2 graphics that delve into the metrics used across your activities.

On the left we have a summary of the number of monetised and non-monetised metrics used across all activities. As you can see in the example below we have a total of 515 monetised metrics used across all activities.

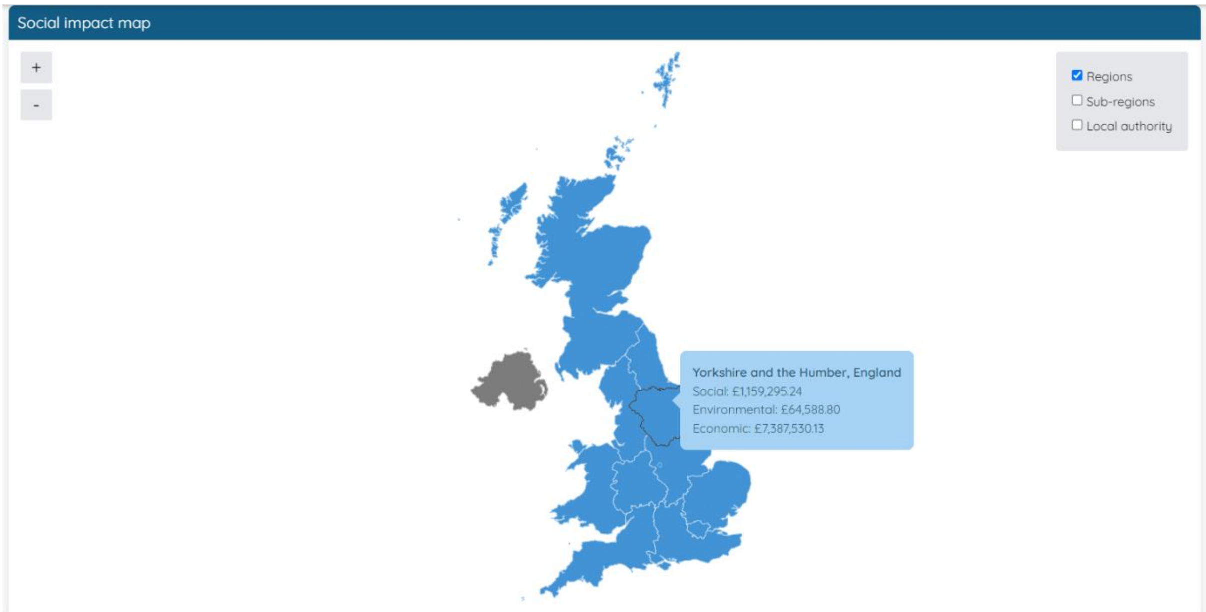
On the right hand side we have a ‘Social Impact breakdown’, this shows the 10 highest metric category values across all projects. The colours on the bar chart relate to which impact areas the metric relates to.

As you can see in the example below, I have hovered over the first purple and yellow bar meaning this metric has social and economic impacts. This has brought a pop up next to the bar showcasing which particular metric this is, in our example it’s for Jobs created – for previously unemployed people. It then displays the total output in our example this is 7000 stakeholders and the total value created which in our example is £114,172,240.00. So we can see across all activities 7000 jobs have been created for previously unemployed people creating a social value of £114,172,240.00.

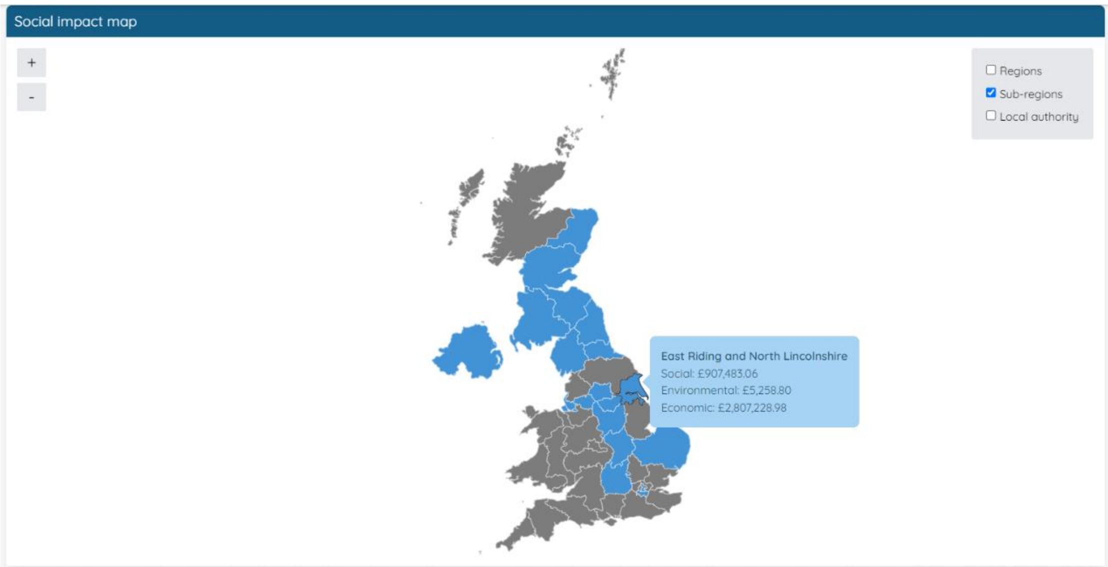




The final graphic on the main dashboard is the 'Social Impact map'. This graphic allows you to visually see on a map of the UK the social value created for each region, sub-region and local authority. As you can see in the example below the map is broken down into the same regions available when setting up an activity. If a particular region is shown as blue on the map it means some value has been created there. If you hover over a certain region, we have used Yorkshire and the Humber in the example below; we can see the social, environmental and economic impact created there.



To change the map and look at certain sub-regions or local authorities, you can use the key in the top right corner. If you tick the sub-regions box or local authority box, the map will update and breakdown the UK into your chosen filter. As you can see in the example below, we have broken the map into sub-regions and hovered over ‘East Riding and North Lincolnshire’ to again see the impact of all activities in your chosen location. Any areas showing as grey, as you can see in a few places in the image below just means no activities have been created in these areas yet.



The map is the last graphic on the main dashboard. If you now want to download a pdf report of the main dashboard please move onto the next section 11.1.1 How to download a PDF report.

11.1.1 How to download a PDF report.

If you need to report the social value you’ve created or forecast across all your activities, then you can either use the dashboard live and talk people through the key areas. Alternatively, you can download a PDF report to print or send to a client, stakeholder etc.

To export the dashboard, simply move to the top right corner of the main dashboard and next to the filters there is a blue icon with a PDF symbol as you can see with the example below.

Once you click this icon, a pop up will be triggered allowing you to download the main dashboard report straight to PDF. If you have your printer connected, then you can send the report straight to print.

Please note any filters that you add to the dashboard will be applied when downloading the report.

11.2 Activity dashboard overview (Forecast)

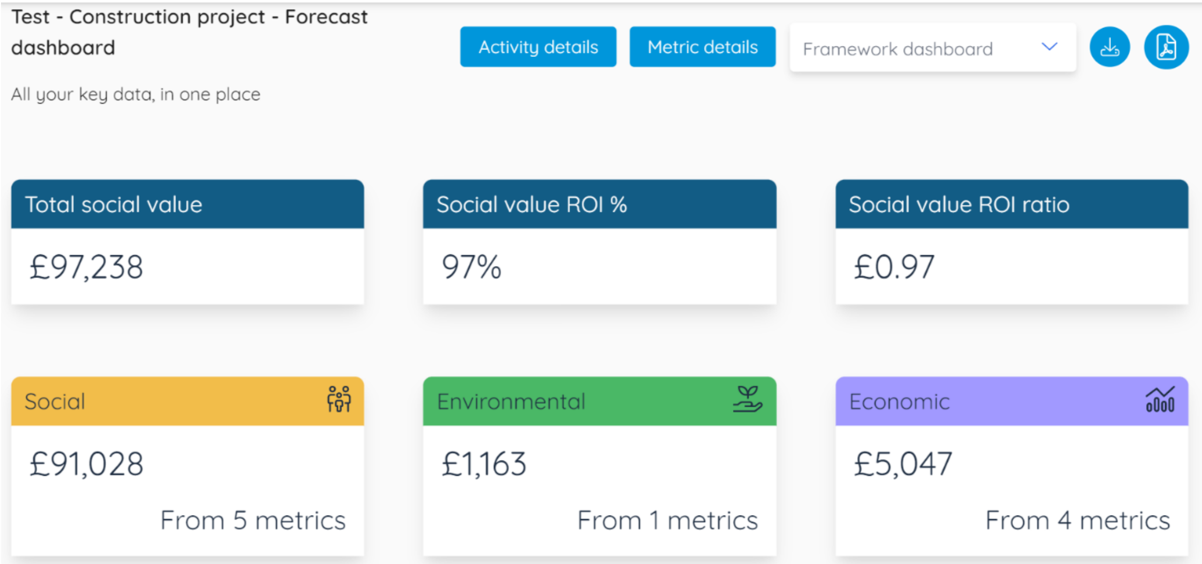
The dashboard at the forecast stage of an activity gives you an overview of your social value and metrics from a specific activity displayed in one easy to understand report. The report can be used to showcase the impact of a certain project, initiative, or activity. This will give more weight to help win bids/tenders, to help win funding etc. This section will give you an overview of the activity dashboard at the forecast stage and how to access the dashboard, explaining what data is displayed and how certain ratios and values are calculated.

There are two quick and easy ways to access the forecast activity dashboard. Firstly, you'll need to navigate to 'My activities' and locate the forecast activity that you want to download a report from. For instructions on how to access 'My activities' please refer to section '12. My Activities Overview'.

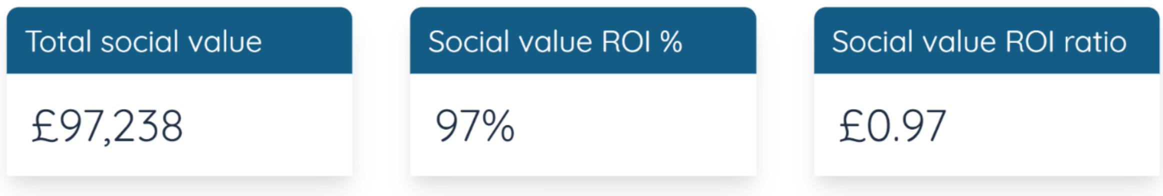
The first and quickest way to access the activity dashboard can be done without opening the activity. Once you've loaded the 'My activities' page, locate the activity from the list and on the far-right hand side of the activity tab click the pink icon with a small graph on it, you can see this highlighted in the image below.

Alternatively, if you have just created an activity or you already have an activity open on the metric or activity details page. Then scroll to the top of the page and there will be an icon labelled 'Dashboard' as you can see in the image below.

Simply click 'Dashboard' and you will be redirected to the activity dashboard. As you can see in the screenshot below, across the top of the dashboard starting in the top left corner is the name of the activity and which stage the activity is in. You can then access the activity or metric details with the two blue buttons in the centre. You then have the framework dashboard filter and 2 blue circle icons that will allow you to export the report in word, excel or PDF format.



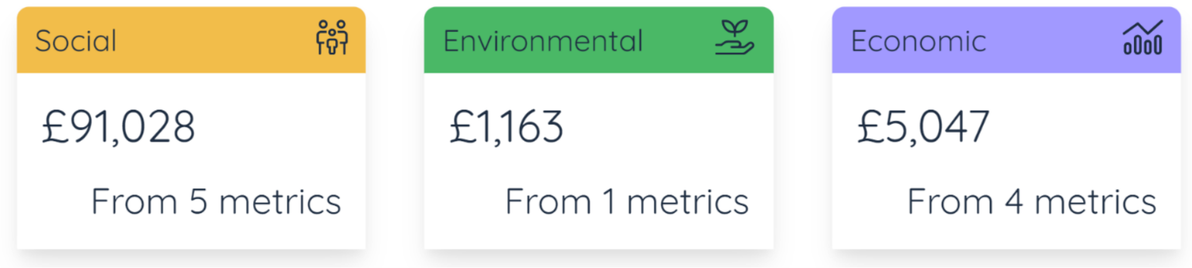
Moving down the dashboard, the first three breakdowns from left to right show the forecasted 'Total social value', the 'Social Value Return on Investment (ROI) %' and the 'Social value ROI ratio' as you can see below.



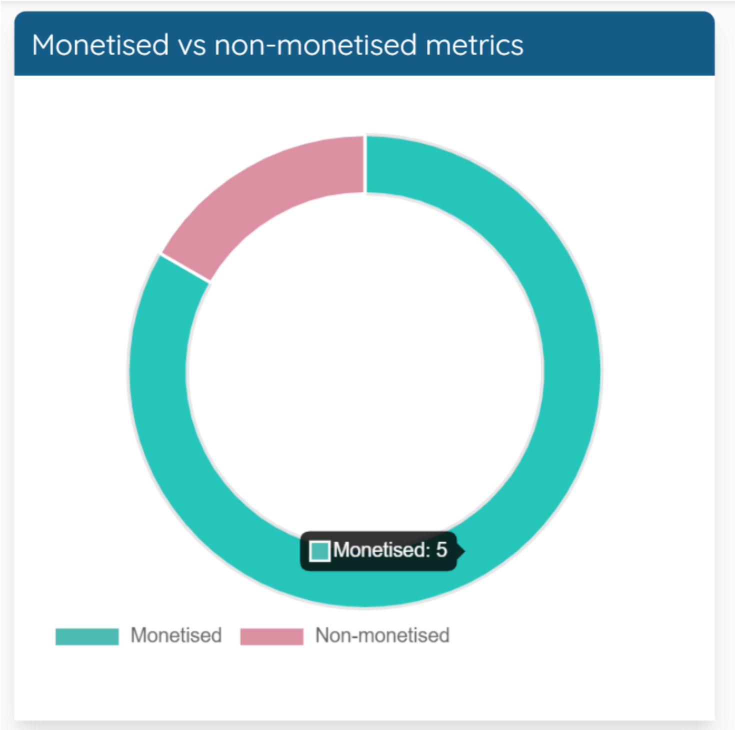
The 'Total social value' is straight forward and displays the social value from all your target metrics for this specific activity.

The 'Social value ROI %' and the 'Social value ROI ratio' display the forecasted return on investment from your activity in two units. This is calculated by taking the forecasted total social value from your target metrics and dividing it by the overall spend on the activity. In the example above, the total social value is £97,238 and the total activities spend is £100,000. Therefore, the forecasted ROI for every £1 spent, £0.97, is forecast to be created in social value, which is a 97% return on investment.

Moving down the dashboard, the next 3 graphics showcase the forecasted value for the three key impact areas of the activity. It breaks down the Social, environmental, and economic impact of your activity and metrics. As you can see in the example below, our activity is forecast to have a social impact value of £91,028 and just below you can see how many metrics this relates to which is 5 metrics.

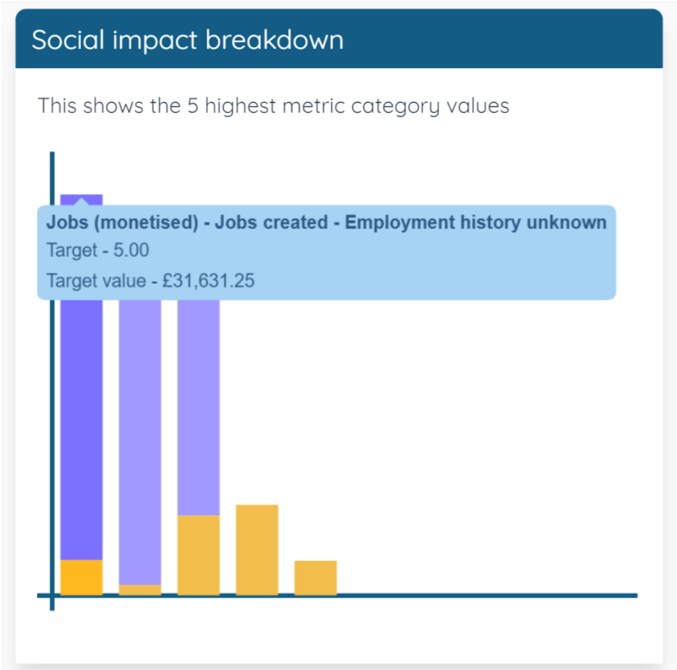


Moving on, we have two infographics, side by side the first showcases the number of monetised vs non-monetised metrics added to the activity. When adding metrics, you have the choice between monetised and non-monetised and this graph displays this key data as you can see below.

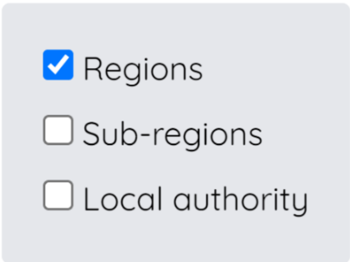


Simply hover over the green section of the pie chart to see the number of monetised metrics you've added and hover over the red section to see the number of non-monetised metrics added to the activity.

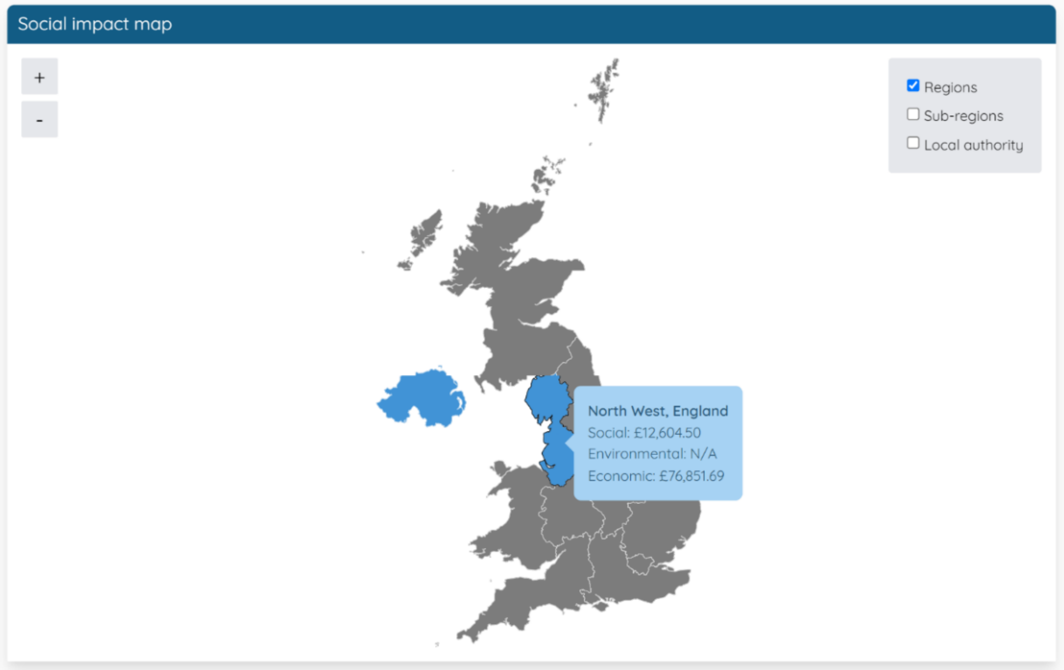
The next infographic showcases a Social impact breakdown of your highest metric category values. The metrics from your activity will be shown on a bar chart in order of the highest value descending, if you hover over one of the bars it will display which metric it relates to, your target output and target value as you can see in the example below.



Finally, the last breakdown on the forecast dashboard is a 'Social Impact Map'. This map showcases your activities forecasted impact broken down by region, sub-region, and local authority. You can use the filters in the top right corner of the map to swap between the different layers of the map as you can see below.



The map will show blue areas for any region, sub-region or local authority that your activity is forecasted to have an impact on. If you hover a blue area on the map, a small pop up will appear showcasing the forecasted social, environmental and economic impact for that specific area. You can see an example in the image below, I have hovered over the North West and the map is displaying a forecasted social impact of £12,604.50 and a forecasted economic impact of £76,851.69.

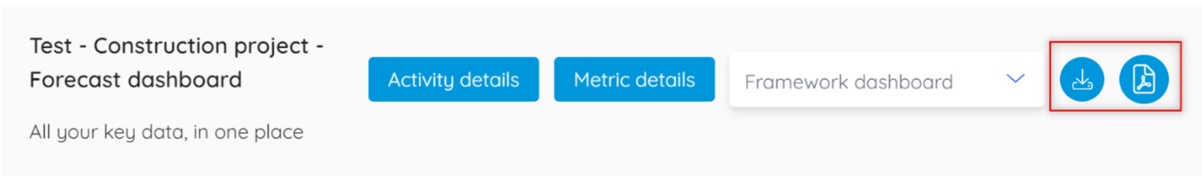


11.2.1 How to export a report (Excel, PDF & Word)

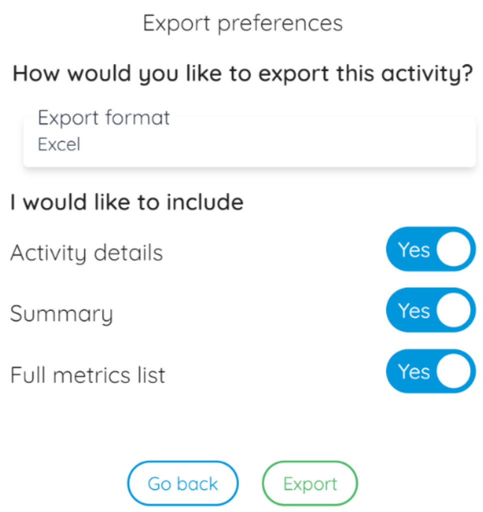
The forecast dashboard can be exported in a number of different formats. The PDF export will give you an overview of the dashboard with screenshots of the different breakdowns attached to the report. The Excel and Word exports give a more detailed breakdown of the metrics added to your activity.

Firstly, you will need to access the dashboard for you chosen forecast activity, for instructions on how to do this please refer to the instructions in 'Section 11.2 Activity dashboard overview (Forecast)'.

Once you are on the dashboard, move to the top right corner of the dashboard and there are two blue icons that can be used to export a report as you can see highlighted in the image below.



The first blue icon with a downward pointing arrow on can be used to export a report in either word or excel format. Once you click this icon a pop-up will appear for you to choose your export preferences. To choose the format of your export you have a field labelled 'Export format' which will allow you to choose between word or excel. You then have the option to include the activity details, a summary, and a full metrics list. You can see an example of the export preferences pop up below.



If you wish to export a PDF format of the dashboard , then click the second blue icon in the top right of the dashboard with the PDF icon on it.

A pop-up will then appear which allow you to save a PDF copy of the dashboard or alternatively directly print the report.

11.3 Activity dashboard overview (Monitor)

The dashboard at the monitor stage of an activity gives you an overview of your social value and metrics from a specific activity displayed in one easy to understand report. The report can be used to showcase your initial targeted impact as well as your achieved value.

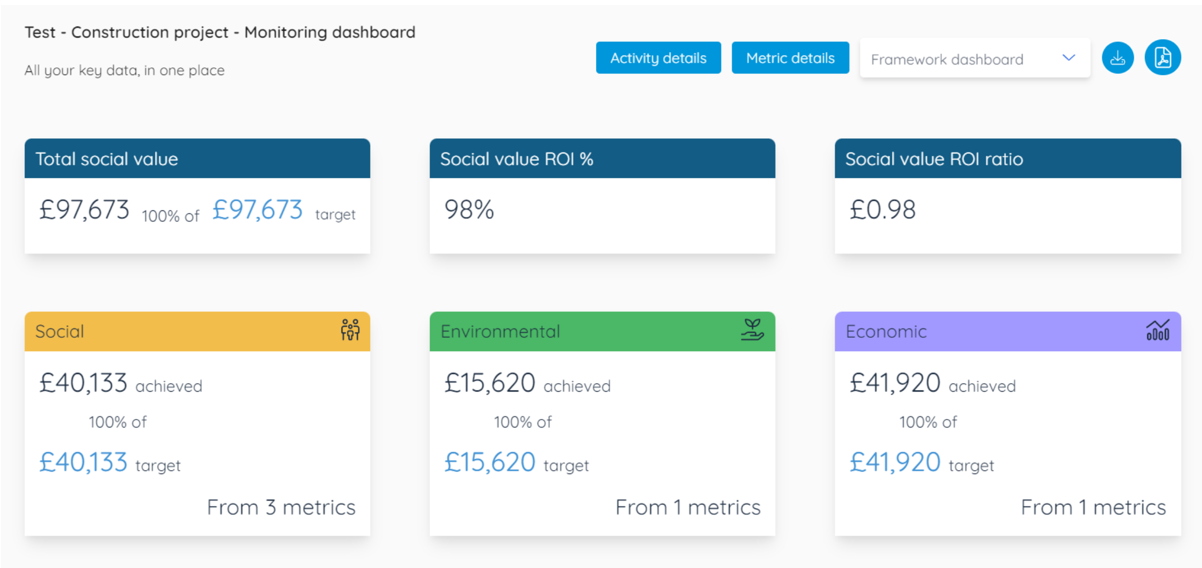
This section will give you an overview of the activity dashboard at the monitor stage and how to access the dashboard, explaining what data is displayed and how certain ratios and values are calculated.

There are two quick and easy ways to access the monitor activity dashboard. Firstly, you'll need to navigate to 'My activities' and locate the monitor activity that you want to download a report from. For instructions on how to access 'My activities' please refer to section '12. My Activities Overview.

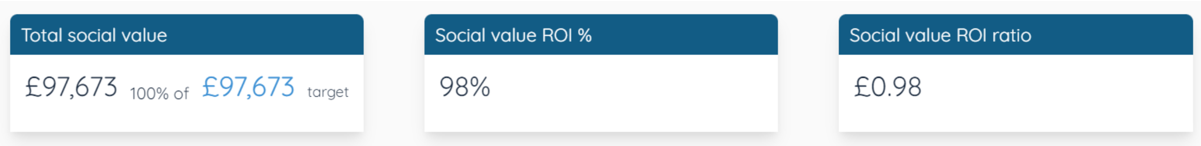
The first and quickest way to access the activity dashboard can be done without opening the activity. Once you've loaded the 'My activities' page, locate the activity from the list and on the far-right hand side of the activity tab click the pink icon with a small graph on it, you can see this highlighted in the image below.

Alternatively, if you have just created an activity or you already have an activity open on the metric or activity details page. Then scroll to the top of the page and there will be an icon labelled 'Dashboard' as you can see in the image below.

Simply click 'Dashboard' and you will be redirected to the activity dashboard. As you can see in the screenshot below, across the top of the dashboard starting in the top left corner is the name of the activity and which stage the activity is in. You can then access the activity or metric details with the two rectangle blue buttons in the centre. You then have the framework dashboard filter that will allow you to access a report showing your National Social Value Standard data aligned against a few alternative social value frameworks. Finally, there are 2 blue circle icons that will allow you to export the report in word, excel or PDF format.



Moving down the dashboard, the first three breakdowns from left to right show the target and achieved 'Total social value'. The blue number labelled target is the target social value from the initial metric targets. The black number is the achieved social value from the data added against the target metrics during the monitor stage. The next two breakdowns show the current achieved 'Social Value Return on Investment (ROI) %' and 'Social value ROI ratio' as you can see below.

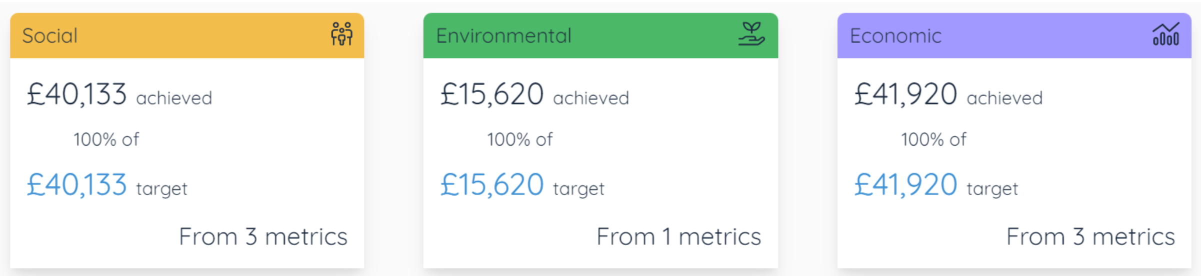


The 'Total social value' is straight forward and displays the target and achieved social value from your metrics for this specific activity.

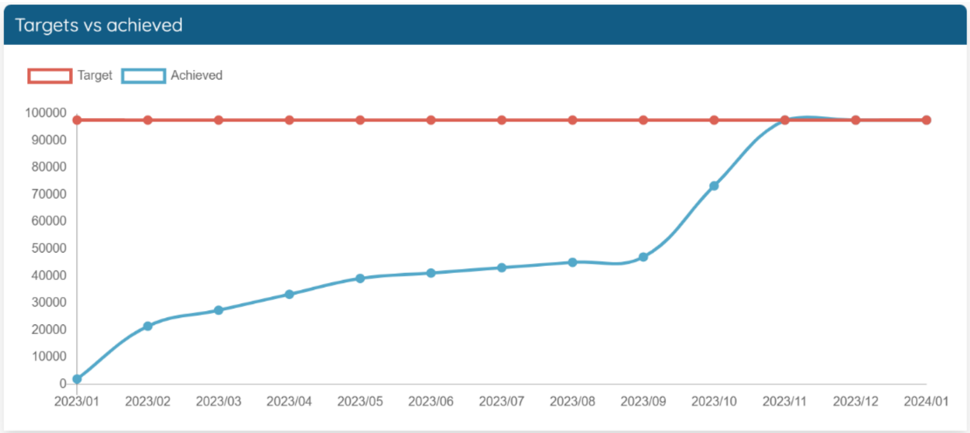
The 'Social value ROI %' and the 'Social value ROI ratio' display the achieved return on investment from your activity in two units. This is calculated by taking the achieved total social value from your metrics and dividing it by the overall spend on the activity. In the example above, the total social value is £97,673 and the total activities spend is £100,000. Therefore, the achieved ROI for every £1 spent, £0.98, has been created in social value, which is a 98% return on investment.

Moving down the dashboard, the next 3 graphics showcase the target and achieved value for the three key impact areas of the activity. It breaks down the Social, environmental, and economic impact of your activity and metrics.

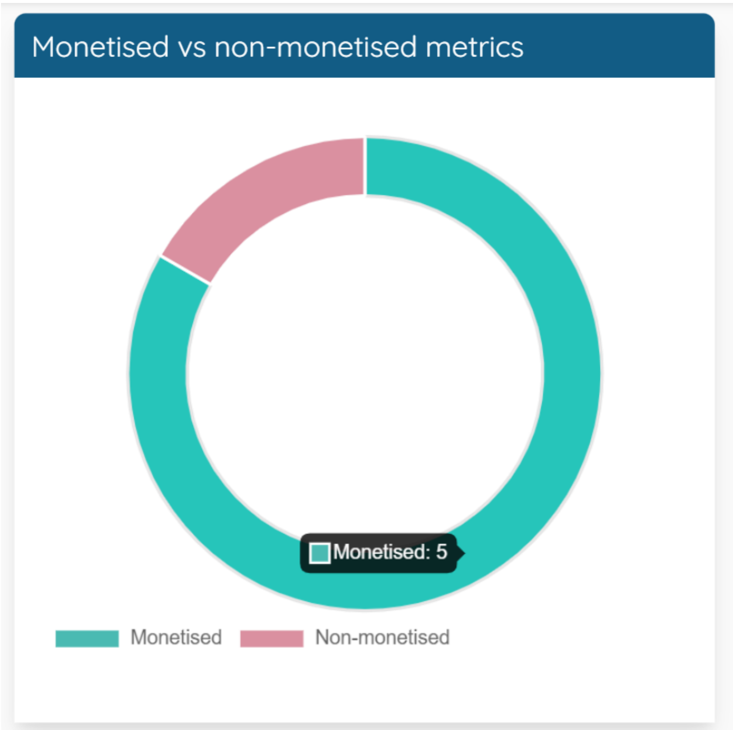
As you can see in the example below, the activity has a target social impact value of £40,133 and an achieved value of £40,133 showing that this is 100% of the target completed. Below the values you can also see how many metrics this relates to which is 3 metrics.



The next breakdown on the monitor dashboard is a line graph displaying the total social value target for the activity vs the achieved social value. As you can see in the image below, along the Y axis is the value in £ and along the X axis is the date. The red line references the target total social value for the activity and the blue line references the achieved social value entered during the monitoring stage of the activity and will update as data is entered periodically.

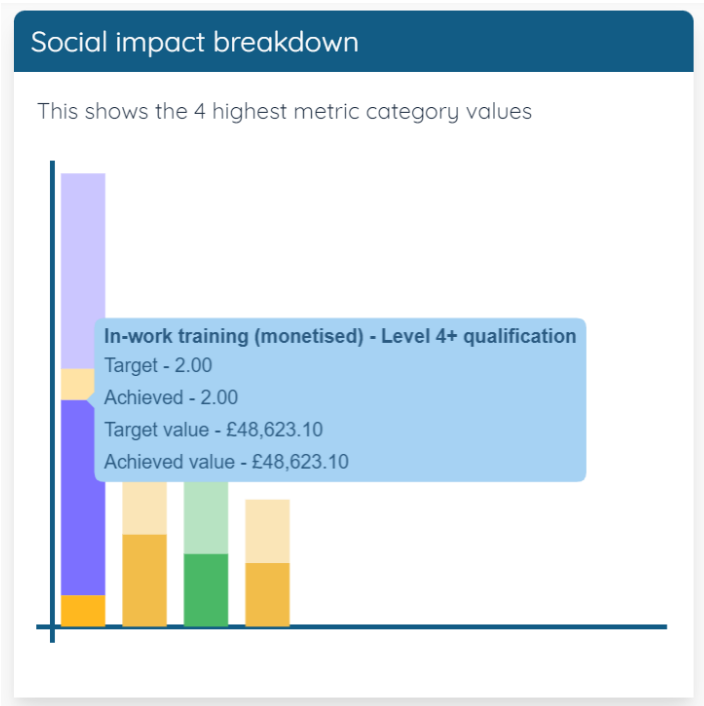


Moving on, we have two infographics, side by side the first showcases the number of monetised vs non-monetised metrics added to the activity. When adding metrics, you have the choice between monetised and non-monetised and this graph displays this key data as you can see below.

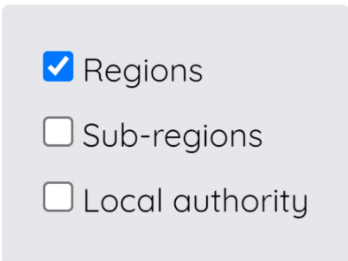


Simply hover over the green section of the pie chart to see the number of monetised metrics you've added and hover over the red section to see the number of non-monetised metrics added to the activity.

The next infographic showcases a Social impact breakdown of your highest metric category values. The metrics from your activity will be shown on a bar chart in order of the highest value descending, if you hover over one of the bars it will display which metric it relates to, your target and achieved output and target and achieved value as you can see in the example below.



Finally, the last breakdown on the monitor dashboard is a 'Social Impact Map'. This map showcases your activities target and achieved impact broken down by region, sub-region, and local authority. You can use the filters in the top right corner of the map to swap between the different layers of the map as you can see below.



The map will show blue areas for any region, sub-region or local authority that your activity has achieved an impact on. If you hover a blue area on the map, a small pop up will appear showcasing the target and achieved social, environmental and economic impact for that specific area. You can see an example in the image below, I have hovered over the North West and the map is displaying a target social impact of £40,132.80 and an achieved social impact of £40,132.80.

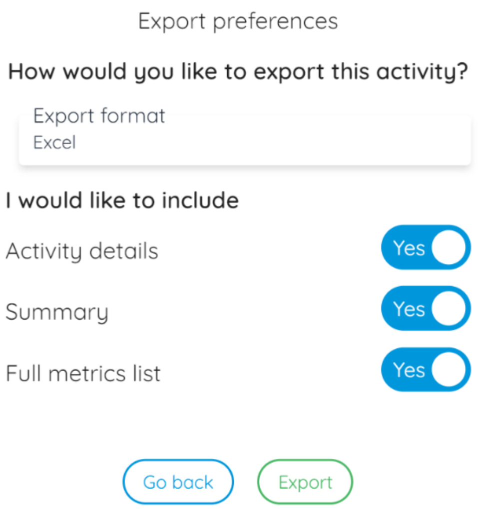
11.3.1 How to export a report (Excel, PDF & Word)

The monitor dashboard can be exported in a number of different formats. The PDF export will give you an overview of the dashboard with screenshots of the different breakdowns attached to the report. The Excel and Word exports give a more detailed breakdown of the metrics added to your activity.

Firstly, you will need to access the dashboard for you chosen monitor activity, for instructions on how to do this please refer to the instructions in 'Section 11.3 [Activity dashboard overview (Monitor).]

Once you are on the dashboard, move to the top right corner of the dashboard and there are two blue icons that can be used to export a report as you can see highlighted in the image below.

The first blue icon with a downward pointing arrow on can be used to export a report in either word or excel format. Once you click this icon a pop-up will appear for you to choose your export preferences. To choose the format of your export you have a field labelled ‘Export format’ which will allow you to choose between word or excel. You then have the option to include the activity details, a summary, and a full metrics list. You can see an example of the export preferences pop up below.



If you wish to export a PDF format of the dashboard, then click the second blue icon in the top right of the dashboard with the PDF icon on it.

A pop-up will then appear which allow you to save a PDF copy of the dashboard or alternatively directly print the report.

11.4 Activity dashboard overview (Evaluation)

The dashboard at the evaluation stage of an activity gives you an overview of your social value and metrics from a specific activity displayed in one easy to understand report. The report can be used to showcase achieved social value from a completed activity.

* Please note if the activity has been moved from the Monitor to the evaluation the dashboard will display both the initial target and achieved value. If you have created a new activity in the evaluation stage, then the dashboard will just show achieved data. *

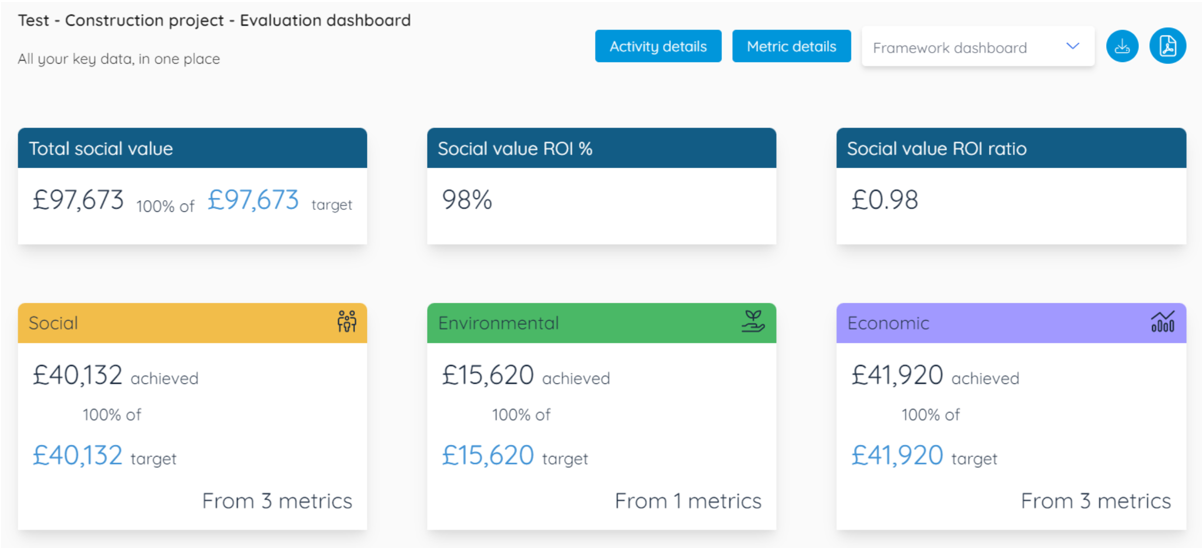
This section will give you an overview of the activity dashboard at the evaluation stage and how to access the dashboard, explaining what data is displayed and how certain ratios and values are calculated.

There are two quick and easy ways to access the forecast activity dashboard. Firstly, you'll need to navigate to 'My activities' and locate the evaluation activity that you want to download a report from. For instructions on how to access 'My activities' please refer to section 12. My Activities Overview.

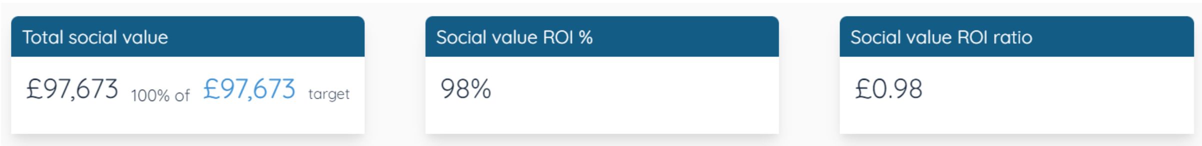
The first and quickest way to access the activity dashboard can be done without opening the activity. Once you've loaded the 'My activities' page, locate the activity from the list and on the far-right hand side of the activity tab click the pink icon with a small graph on it, you can see this highlighted in the image below.

Alternatively, if you have just created an activity or you already have an activity open on the metric or activity details page. Then scroll to the top of the page and there will be an icon labelled 'Dashboard' as you can see in the image below.

Simply click 'Dashboard' and you will be redirected to the activity dashboard. As you can see in the screenshot below, across the top of the dashboard starting in the top left corner is the name of the activity and which stage the activity is in. You can then access the activity or metric details with the two rectangle blue buttons in the centre. You then have the framework dashboard filter that will allow you to access a report showing your National Social Value Standard data aligned against a few alternative social value frameworks. Finally, there are 2 blue circle icons that will allow you to export the report in word, excel or PDF format.



Moving down the dashboard, the first three breakdowns from left to right show the target and achieved 'Total social value'. The blue number labelled target is the target social value from the initial metric targets at the forecast or monitor stage. The black number is the achieved social value from the data added against the target metrics during the monitor stage. The next two breakdowns show the achieved 'Social Value Return on Investment (ROI) %' and 'Social value ROI ratio' as you can see below.



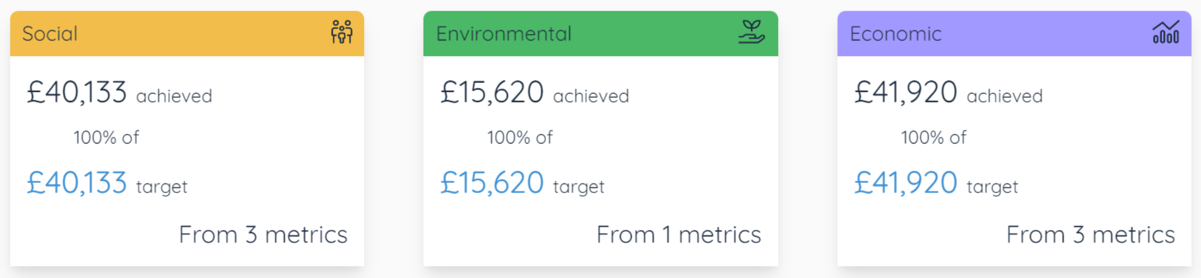
The 'Total social value' is straight forward and displays the target and achieved social value from your metrics for this specific activity.

The 'Social value ROI %' and the 'Social value ROI ratio' display the achieved return on investment from your activity in two units. This is calculated by taking the achieved total social value from your metrics and dividing it by the overall spend on the activity. In the example above, the total social value is £97,673 and the total activities spend is £100,000. Therefore, the achieved ROI for every £1 spent, £0.98, has been created in social value, which is a 98% return on investment.

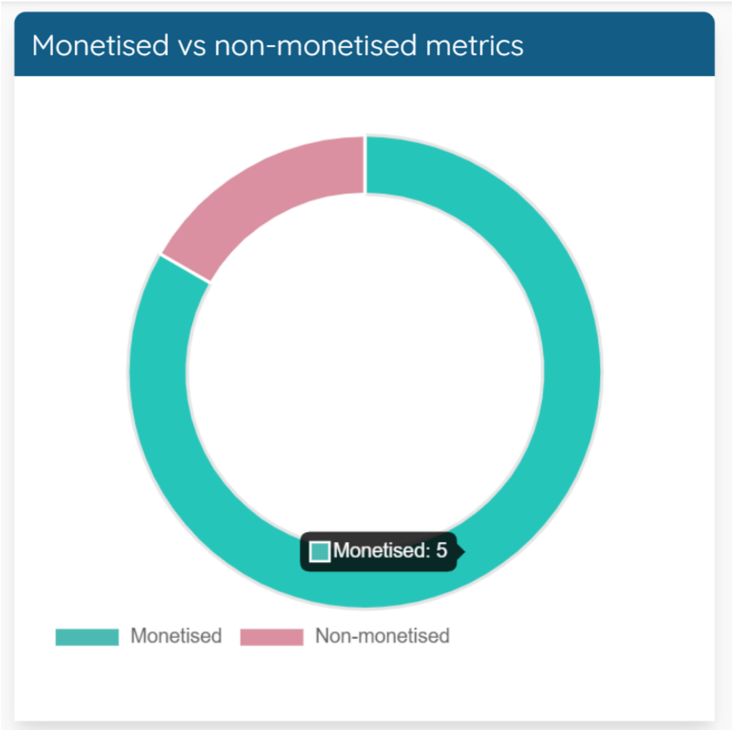
Moving down the dashboard, the next 3 graphics showcase the target and achieved value for the three key impact areas of the activity. It breaks down the Social, environmental, and economic impact of your activity and metrics.

As you can see in the example below, the activity has a target social impact value of £40,133 and an achieved value of £40,133 showing that this is 100%

of the target completed. Below the values you can also see how many metrics this relates to which is 3 metrics.

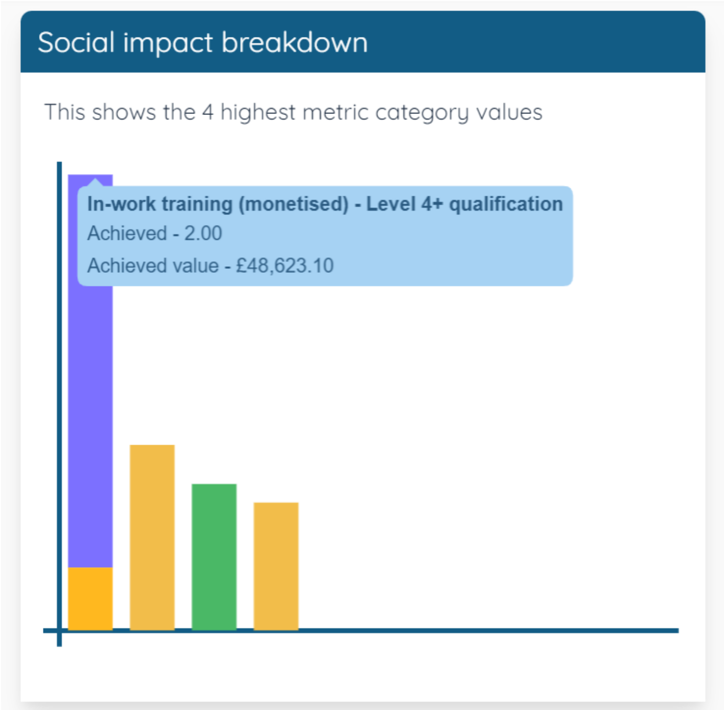


Moving on, we have two infographics, side by side the first showcases the number of monetised vs non-monetised metrics added to the activity. When adding metrics, you have the choice between monetised and non-monetised and this graph displays this key data as you can see below.

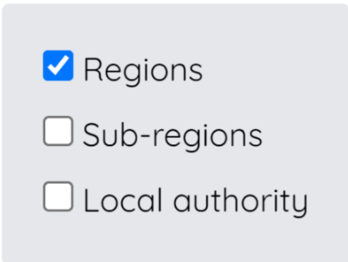


Simply hover over the green section of the pie chart to see the number of monetised metrics you've added and hover over the red section to see the number of non-monetised metrics added to the activity.

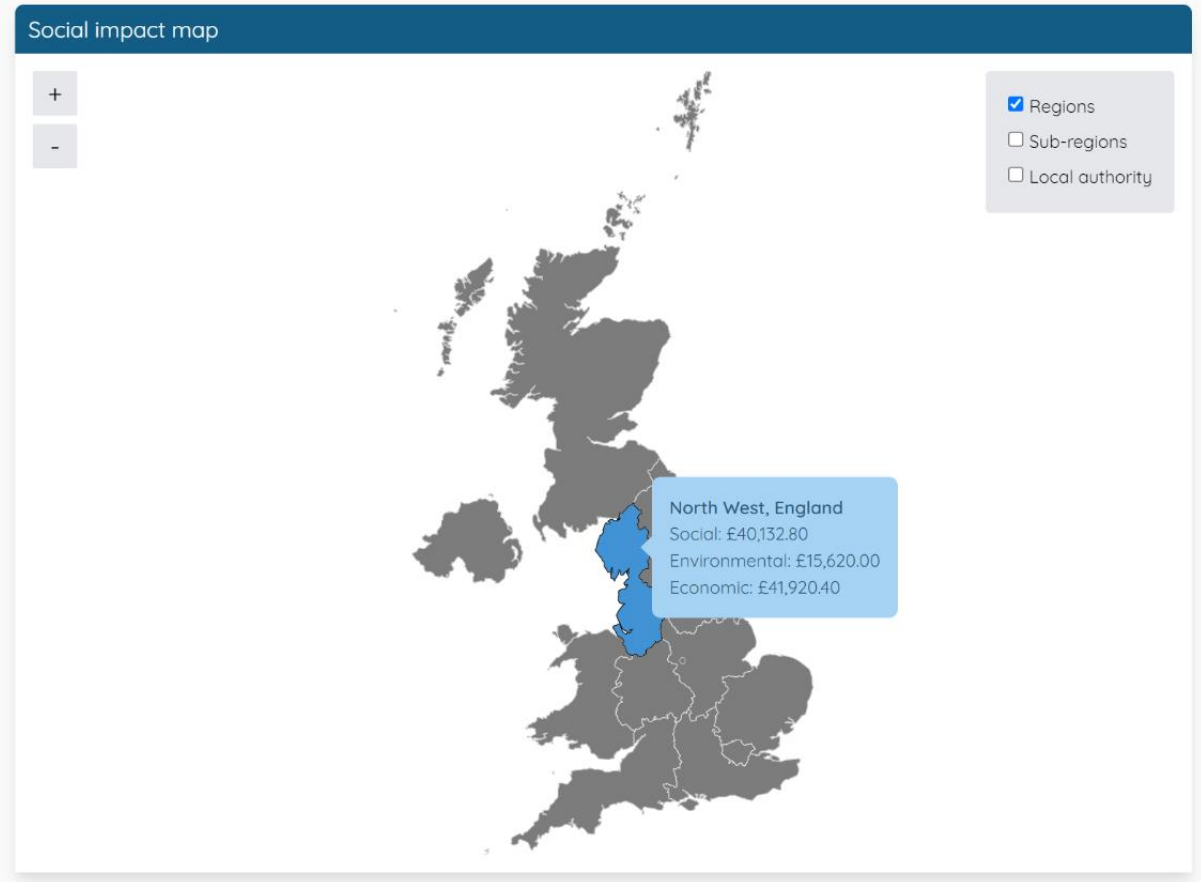
The next infographic showcases a Social impact breakdown of your highest metric category values. The metrics from your activity will be shown on a bar chart in order of the highest value descending. If you hover over one of the bars it will display which metric it relates to, your achieved output and achieved value as you can see in the example below.



Finally, the last breakdown on the evaluation dashboard is a 'Social Impact Map'. This map showcases your activities achieved impact broken down by region, sub-region, and local authority. You can use the filters in the top right corner of the map to swap between the different layers of the map as you can see below.



The map will show blue areas for any region, sub-region or local authority that your activity has achieved an impact on. If you hover a blue area on the map, a small pop up will appear showcasing the achieved social, environmental and economic impact for that specific area. You can see an example in the image below, I have hovered over the North West region and the map is displaying an achieved social impact of £40,132.80, an achieved environmental impact of £15,620.00 and an achieved economic impact of £41,920.40.



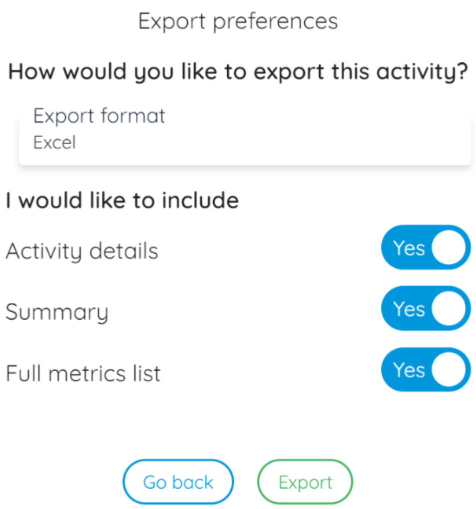
11.4.1 How to export a report (Excel, PDF & Word)

The evaluation dashboard can be exported in a number of different formats. The PDF export will give you an overview of the dashboard with screenshots of the different breakdowns attached to the report. The Excel and Word exports give a more detailed breakdown of the metrics added to your activity.

Firstly, you will need to access the dashboard for you chosen evaluation activity, for instructions on how to do this please refer to the instructions in 'Section [11.4 Activity dashboard overview (Evaluation).]

Once you are on the dashboard, move to the top right corner of the dashboard and there are two blue icons that can be used to export a report as you can see highlighted in the image below.

The first blue icon with a downward pointing arrow on can be used to export a report in either word or excel format. Once you click this icon a pop-up will appear for you to choose your export preferences. To choose the format of your export you have a field labelled 'Export format' which will allow you to choose between word or excel. You then have the option to include the activity details, a summary, and a full metrics list. You can see an example of the export preferences pop up below.



If you wish to export a PDF format of the dashboard, then click the second blue icon in the top right of the dashboard with the PDF icon on it.

A pop-up will then appear which allow you to save a PDF copy of the dashboard or alternatively directly print the report.

11.5 Alternative Framework Dashboard Reports

Within the loop system you have the ability to align your activity data against a number of alternative social value frameworks. It is recommended to use the National Social Value Standard (SVS) wherever possible. However, if you need to see how a specific activities value and metrics align to a certain framework then you can use the framework dashboards to export reports.

The next few chapters will give a full overview of each framework dashboard and how to download a report.

11.5.1 National TOMs Framework Report

The TOMs dashboard sets out your data against the National Themes Outcomes and Measures (TOMs).

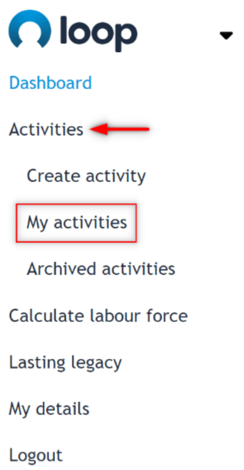
The National Social Value Standard (SVS) metrics, which is the measurement framework Loop uses, have been mapped against the TOMs metrics that appear most similar to help with any TOMs reporting requirements. There are several SVS metrics which do not have a TOMs equivalent due to the greater number of metrics in the SVS framework.

For an overview of why TOMs and SVS metrics and values differ please see more here.

(Link for above: https://staging.project-progress.net/projects/national-svs/wp-content/uploads/2022/09/SVS_TOMs.pdf)

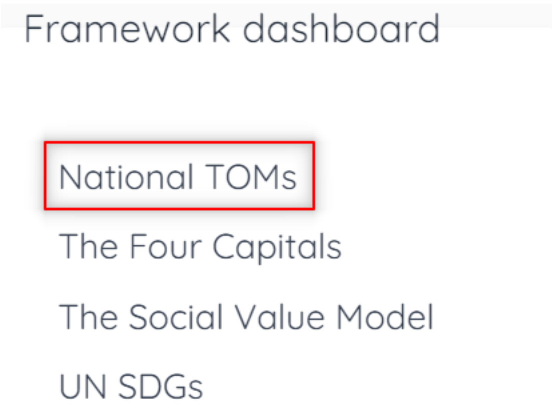
The following instructions apply to all stages of an activity, whether you are creating a forecast, monitor or evaluation activity.

To open the TOMs dashboard, you will need to access the specific activity through the 'My activities' page. Go to the main tool bar in the top left corner of the page and click the 4 blue lines and from the options select 'Activities' then click 'My Activities' as you can see highlighted in the image below.



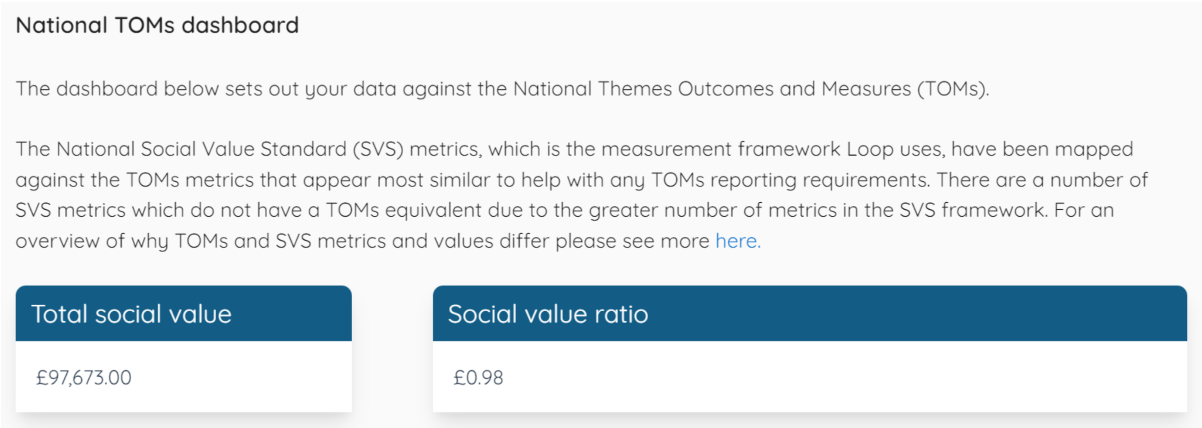
Locate your desired activity from your list and go to the far-right hand side of the activity tab and click the pink icon with a graph icon on it, you can see an example of this below. You will then be taken through to the activity dashboard.

Once on the activity dashboard, in the top right corner there is a field labelled ‘Framework dashboard’ , click this field and a drop down will appear showing 4 options. Choose the top option labelled ‘National TOMs as you can see highlighted below.



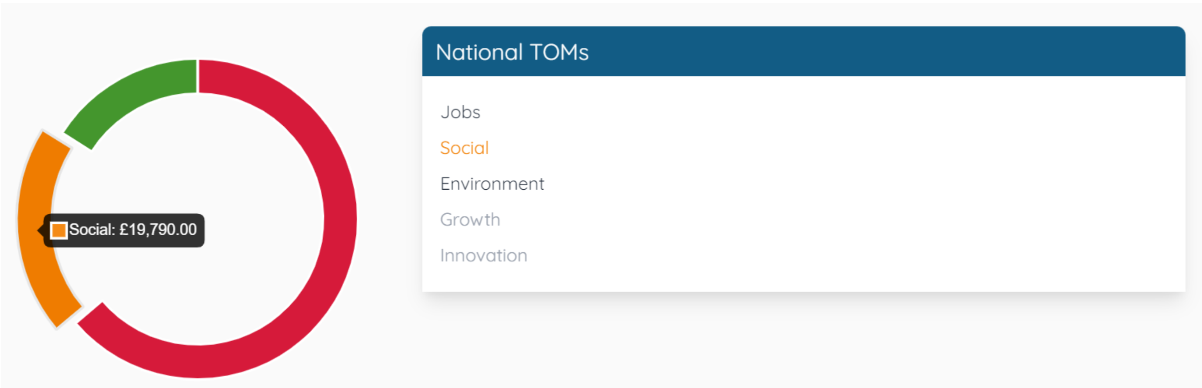
You will then be redirected to the National TOMs dashboard where your activity data will be aligned against the 5 TOMs themes. The values displayed next each metric on the TOMs dashboard relate to the National Social Value Standard (SVS) metric values. The system maps the SVS metrics to the most similar TOMs reference point. The values displayed shouldn’t be reported as TOMs values the dashboard maps your data to display which theme and TOMs reference point the SVS metric relates to.

When you are redirected to the National TOMs dashboard, firstly you will see some text giving some information about the TOMs framework and a link to find out more. Just under that you will have the ‘Total social value’ and ‘Social value ratio’ for your chosen activity as you can see in the image below.



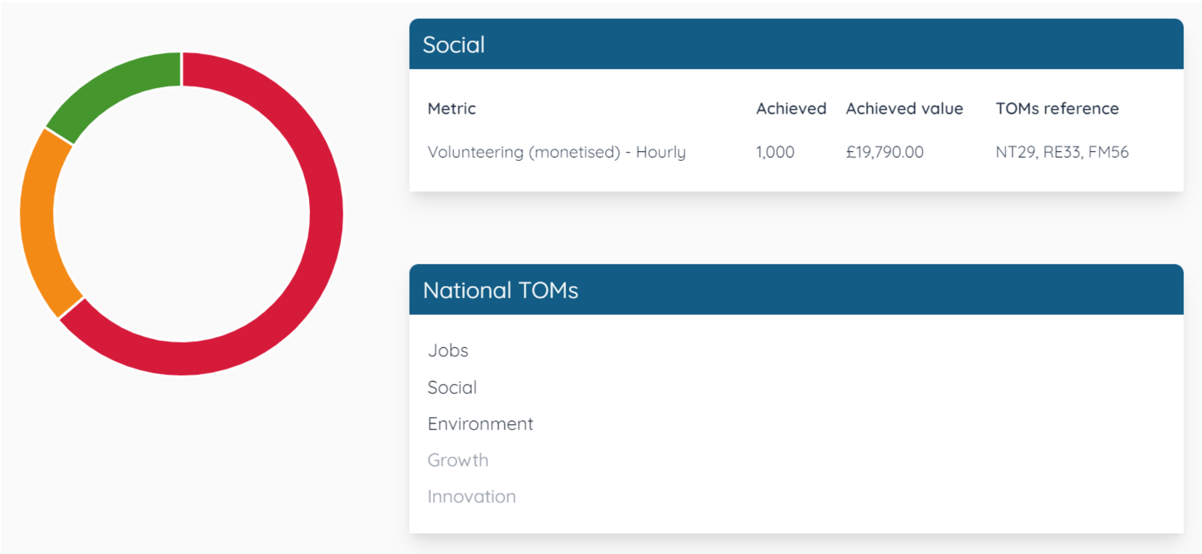
If we move down the dashboard, we can see a breakdown of the SVS metrics against each National TOMs theme. To the left there is a pie chart showing the SVS metric value relating to each theme. If you hover over any section of the pie chart it will show you which theme this is in relation to, and the social value created from the SVS framework.

As you can see in the image below, I have hovered over the yellow section of the pie chart and it is showcasing a social impact value of £19,700. This means we have created £19,700 worth of impact from the SVS metrics relating to the social TOMs theme.



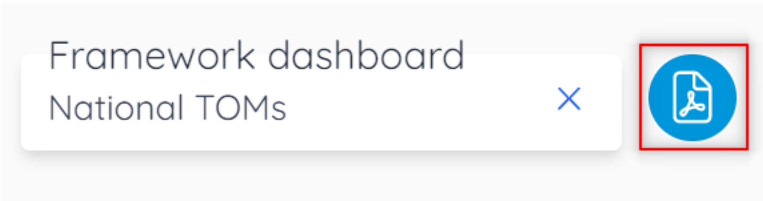
If you require a full breakdown of the metrics and which TOMs reference point the metric relates to, click on the desired theme on the National TOMs table to the right-hand side. A further table will appear above the National TOMs themes showing a breakdown of all metrics that relate to your chosen theme.

As you can see below again, I have selected the ‘Social’ theme from the TOMs framework, and we now get a full breakdown of any SVS metrics that fit into that category. We can see that for this activity I have achieved 1000 hours’ worth of volunteering, and this relates to NT29, RE33 and FM56 reference points on the TOMs framework.



If any themes are greyed out, as you can see with growth and innovation in the image above. This just means that we haven't added any SVS metrics yet that relate to those two themes.

To export a copy of this report, simply scroll to the top of the dashboard and in the top right corner click the blue PDF icon and a pop up will appear asking you to save or print the PDF as you can see from the screenshot below.



11.5.2 United Nation's Sustainable Development Goals (UN SDGs) Report

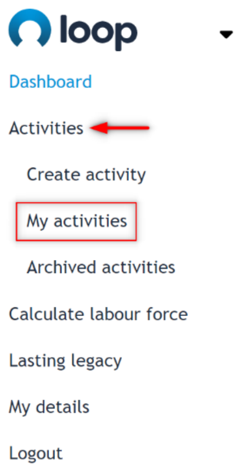
The UN SDGs dashboard sets out your data against the United Nations 17 Sustainable Development Goals.

The metrics entered may be reportable against more than one SDG and some metrics may duplicate.
Do not add individual themes together to calculate your total social value as there may be inaccuracies.

The following instructions apply to all stages of an activity, whether you are creating a forecast, monitor or evaluation activity.

To open the SDGs dashboard, you will need to access the specific activity through the 'My activities' page. Go to the main tool bar in the top left corner of the page and click the 4 blue lines and from the options select

'Activities' then click 'My Activities' as you can see highlighted in the image below.



Locate your desired activity from your list and go to the far-right hand side of the activity tab and click the pink icon with a graph icon on it, you can see an example of this below. You will then be taken through to the activity dashboard.

Once on the activity dashboard, in the top right corner there is a field labelled 'Framework dashboard', click this field and a drop down will appear showing 4 options. Choose the top option labelled 'National TOMs as you can see highlighted below.

You will then be redirected to the UN SDGs dashboard where your activity data will be aligned against the 17 SDG goals. The values displayed next to each metric on the SDGs dashboard relate to the National Social Value Standard (SVS) metric values. The system maps the SVS metrics to the most similar SDG Goal. The values displayed shouldn't be reported as SDGs values the dashboard maps your data to display which theme and SDG goal the SVS metric relates to.

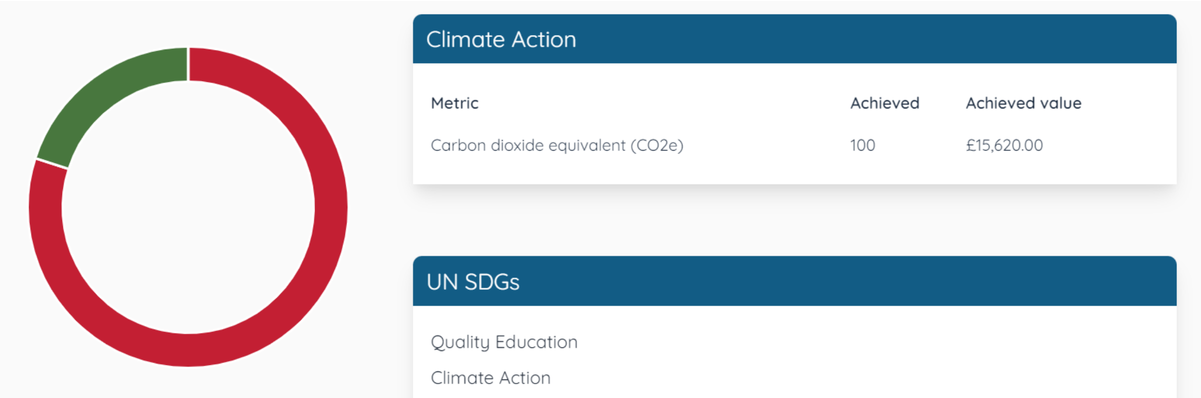
When you are redirected to the UN SDGs dashboard, firstly you will see some text giving some information about the SDGs framework and a link to find out more. Just under that you will have the 'Total social value' and 'Social value ratio' for your chosen activity as you can see in the image below.

If we move down the dashboard, we can see a breakdown of the SVS metrics against each SDGs theme. To the left there is a pie chart showing the SVS metric value relating to each goal. If you hover over any section of the pie chart it will show you which goal this is in relation to the social value created from the SVS framework.

As you can see in the image below, I have hovered over the green section of the pie chart and it is showcasing an impact value of £15,620 for the 'Climate action' goal.. This means we have created £15,620 worth of impact from the SVS metrics relating to the climate action sustainable development goal .

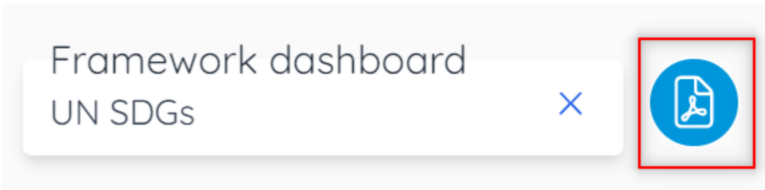
If you require a full breakdown of the metrics, click on the desired goal on the UN SDGs table to the right-hand side. A further table will appear above the UN SDGs showing a breakdown of all metrics that relate to your chosen goal.

As you can see below again, I have selected the 'Climate Action' goal from the SDG framework, and we now get a full breakdown of any SVS metrics that fit into that category. We can see that for this activity I have achieved a reduced carbon dioxide equivalent of 100 tonnes and an achieved value of £15,620.



If any themes are greyed out, as you can see with growth and innovation in the image above. This just means that we haven't added any SVS metrics yet that relate to those two themes.

To export a copy of this report, simply scroll to the top of the dashboard and in the top right corner click the blue PDF icon and a pop up will appear asking you to save or print the PDF as you can see from the screenshot below.



11.5.3 The Social Value Model (PPN06/20) Report

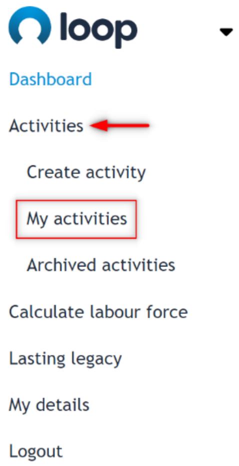
The Social Value Model (SVM) dashboard sets out your data against the governments Social Value Model.

The below includes the 5 Themes from the Social Value Model and displays how the metrics you have entered align to the various Themes. Please only use this to understand how to report against the SVM. To learn more about the HM Government's Social Value Model and the themes included click here.

(Link: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/940826/Social-Value-Model-Edn-1.1-3-Dec-20.pdf)

The following instructions apply to all stages of an activity, whether you are creating a forecast, monitor or evaluation activity.

To open the SVM dashboard, you will need to access the specific activity through the 'My activities' page. Go to the main tool bar in the top left corner of the page and click the 4 blue lines and from the options select 'Activities' then click 'My Activities' as you can see highlighted in the image below.



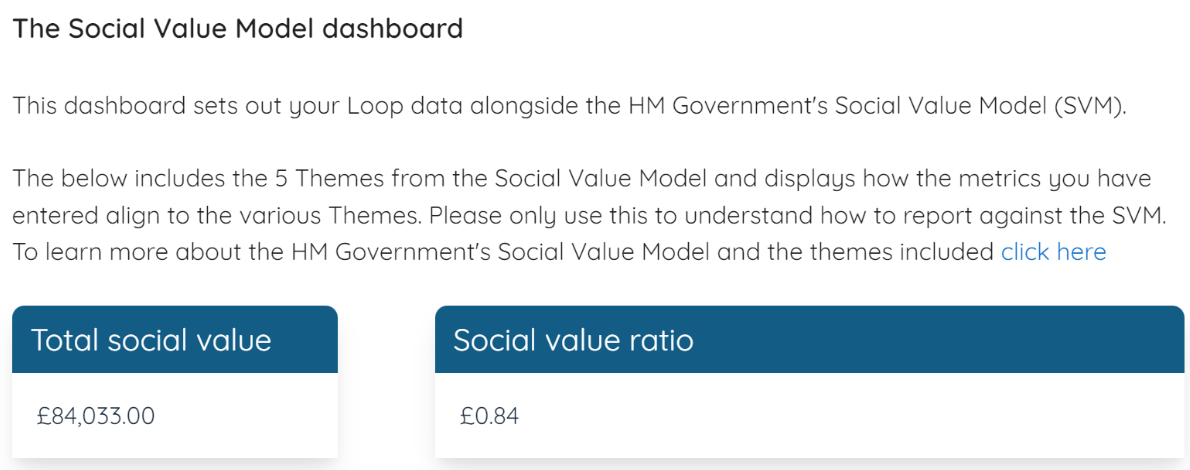
Locate your desired activity from your list and go to the far-right hand side of the activity tab and click the pink icon with a graph icon on it, you can see an example of this below. You will then be taken through to the activity dashboard.

Once on the activity dashboard, in the top right corner there is a field labelled 'Framework dashboard', click this field and a drop down will appear showing 4 options. Choose the top option labelled 'The Social Value Model' as you can see highlighted below.

You will then be redirected to 'The Social Value Model' dashboard where your activity data will be aligned against the 5 themes from the model. The values displayed next to each metric on the SVM dashboard relate to the

National Social Value Standard (SVS) metric values. The system maps the SVS metrics to the most similar SVM theme. The values displayed shouldn't be reported as Social Value model values, the dashboard maps your data to display which theme the SVS metric relates to.

When you are redirected to the Social Value Model dashboard, firstly you will see some text giving some information about the model and a link to find out more. Just under that you will have the 'Total social value' and 'Social value ratio' for your chosen activity as you can see in the image below.

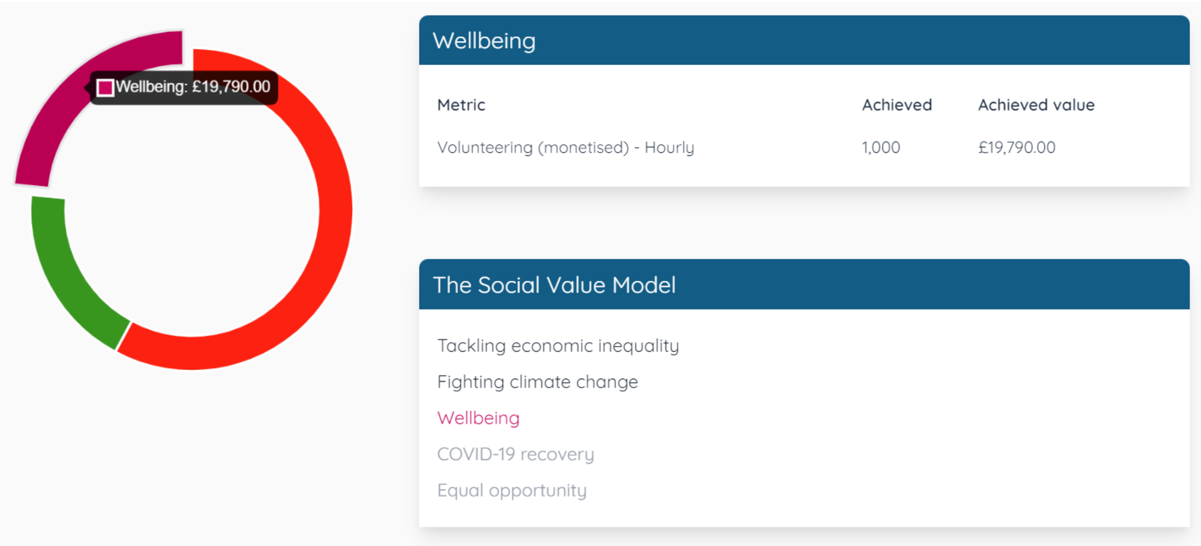


If we move down the dashboard, we can see a breakdown of the SVS metrics against each Social Value Model theme. To the left there is a pie chart showing the SVS metric value relating to each theme. If you hover over any section of the pie chart it will show you which goal this is in relation to the social value created from the SVS framework.

As you can see in the image below, I have hovered over the purple section of the pie chart and it is showcasing an impact value of £19,790 for the 'Wellbeing' theme. This means we have created £19,790 worth of impact from the SVS metrics relating to the wellbeing Social Value Model theme .

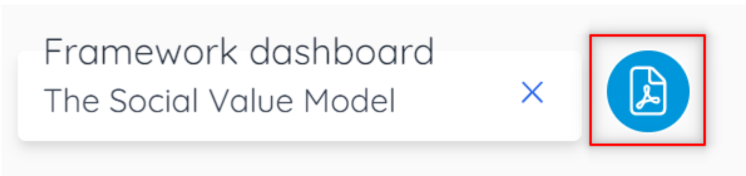
If you require a full breakdown of the metrics, click on the desired theme on the Social Value Model table to the right-hand side. A further table will appear above the table showing a breakdown of all metrics that relate to your chosen theme.

As you can see in the image below again, I have selected the ‘Wellbeing’ theme from the Social Value Model framework, and we now get a full breakdown of any SVS metrics that fit into that theme. We can see that for this activity that under the wellbeing theme, 1,000 hours’ worth of volunteering has been achieved with an achieved value of £19,790.00.



If any themes are greyed out, as you can see with COVID-19 recovery and Equal opportunity in the image above. This just means that we haven’t added any SVS metrics yet that relate to those two themes.

To export a copy of this report, simply scroll to the top of the dashboard and in the top right corner click the blue PDF icon and a pop up will appear asking you to save or print the PDF as you can see from the screenshot below.



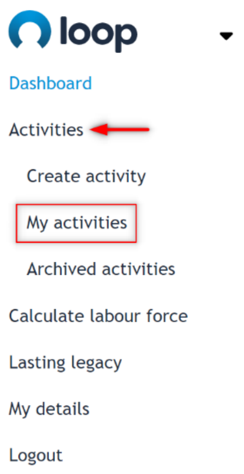
11.5.4 Four Capitals Framework Report

The Four Capitals represent a different way to assess Social Value. Your data has been aggregated across the themes so that you can report against the Four Capitals.

As of 2021 the 5 capitals have now become the 4 capitals. The Financial Capital and the Manufacturing Capital have become one Capital and renamed as the Financial/Physical Capital. To learn more visit https://constructioninnovationhub.org.uk/

The following instructions apply to all stages of an activity, whether you are creating a forecast, monitor or evaluation activity.

To open the Four Capitals dashboard, you will need to access the specific activity through the 'My activities' page. Go to the main tool bar in the top left corner of the page and click the 4 blue lines and from the options select 'Activities' then click 'My Activities' as you can see highlighted in the image below.

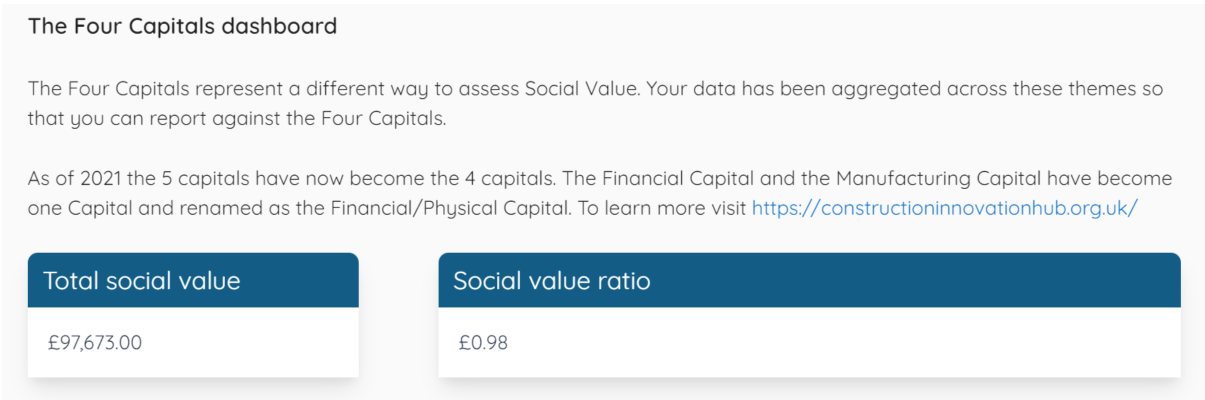


Locate your desired activity from your list and go to the far-right hand side of the activity tab and click the pink icon with a graph icon on it, you can see an example of this below. You will then be taken through to the activity dashboard.

Once on the activity dashboard, in the top right corner there is a field labelled 'Framework dashboard', click this field and a drop down will appear showing 4 options. Choose the top option labelled 'The Four Capitals' as you can see highlighted below.

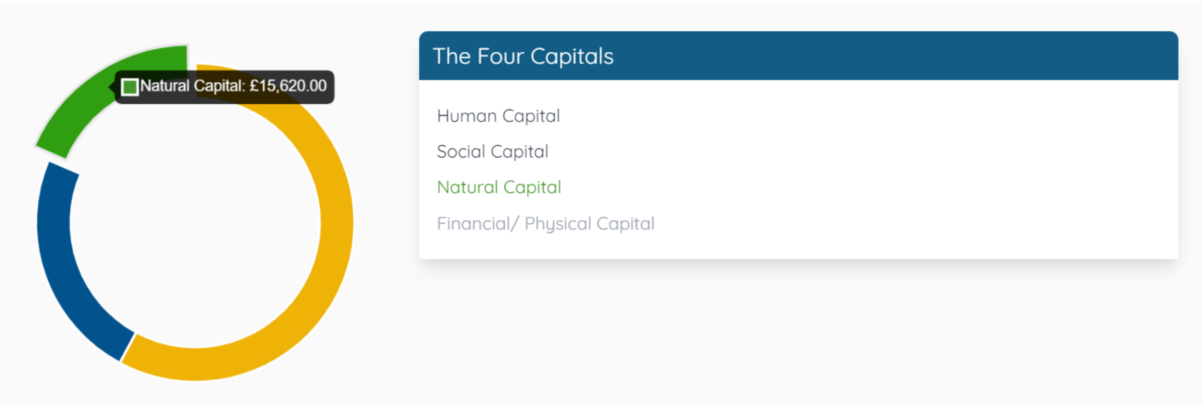
You will then be redirected to 'The Four Capitals' dashboard where your activity data will be aligned against the 5 themes from the model. The values displayed next to each metric on the dashboard relate to the National Social Value Standard (SVS) metric values. The system maps the SVS metrics to the most similar 4 Capitals theme. The values displayed shouldn't be reported as Four Capitals values, the dashboard maps your data to display which theme the SVS metric relates to.

When you are redirected to the dashboard, firstly you will see some text giving some information about The Four Capitals and a link to find out more. Just under that you will have the 'Total social value' and 'Social value ratio' for your chosen activity as you can see in the image below.



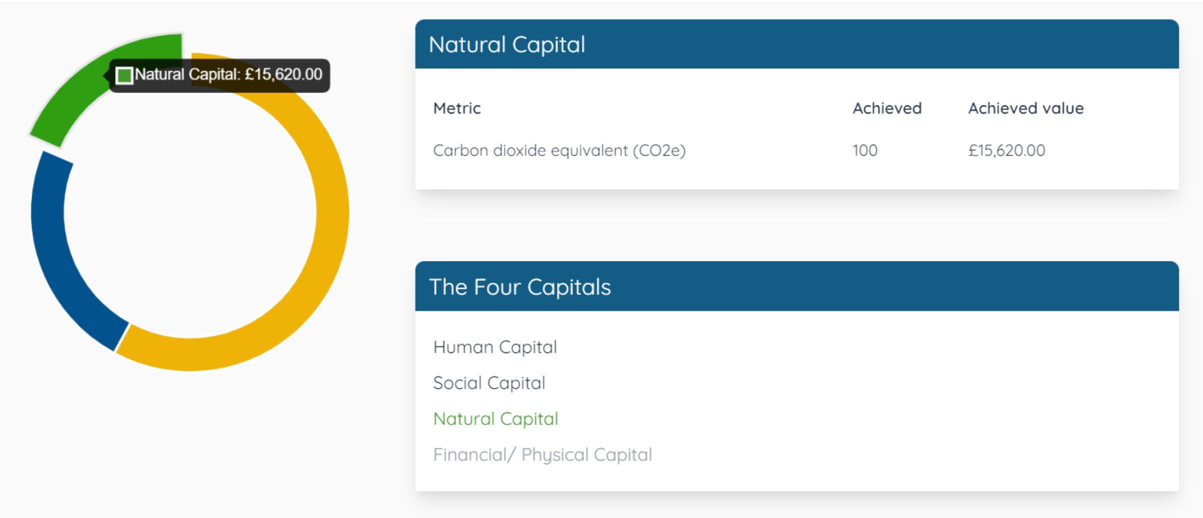
If we move down the dashboard, we can see a breakdown of the SVS metrics against each capital. To the left there is a pie chart showing the SVS metric value relating to each theme. If you hover over any section of the pie chart it will show you which goal this is in relation to the social value created from the SVS framework.

As you can see in the image below, I have hovered over the green section of the pie chart and it is showcasing an impact value of £15,620.00 for the 'Natural Capital'. This means we have created £15,620.00 worth of impact from the SVS metrics relating to 'Natural Capital'.



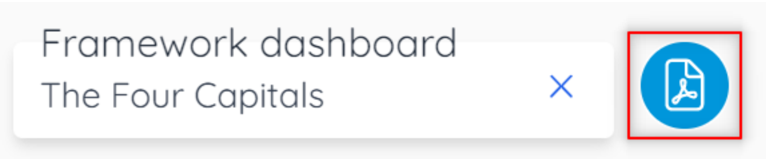
If you require a full breakdown of the metrics, click on the desired capital on the table to the right-hand side. A further table will appear above showing a breakdown of all metrics that relate to your chosen theme.

As you can see in the image below again, I have selected the 'Natural Capital' from 'The Four Capitals' framework, and we now get a full breakdown of any SVS metrics that fit into that theme. We can see that for this activity under the 'Natural Capital', 100 tonnes of Carbon dioxide equivalent (CO2e) have been achieved with an achieved value of £15,620.00.



If any themes are greyed out, as you can see with 'Financial/physical capital' in the image above. This just means that we haven't added any SVS metrics yet that relate to this capital.

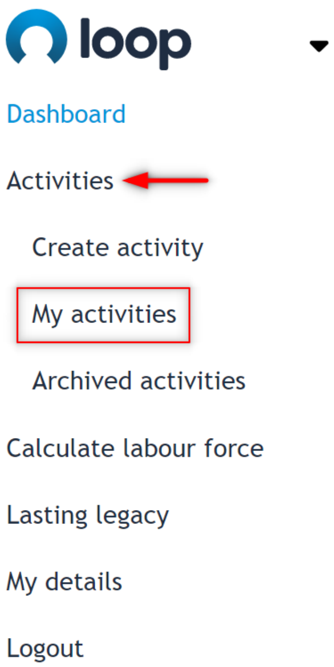
To export a copy of this report, simply scroll to the top of the dashboard and in the top right corner click the blue PDF icon and a pop up will appear asking you to save or print the PDF as you can see from the screenshot below.



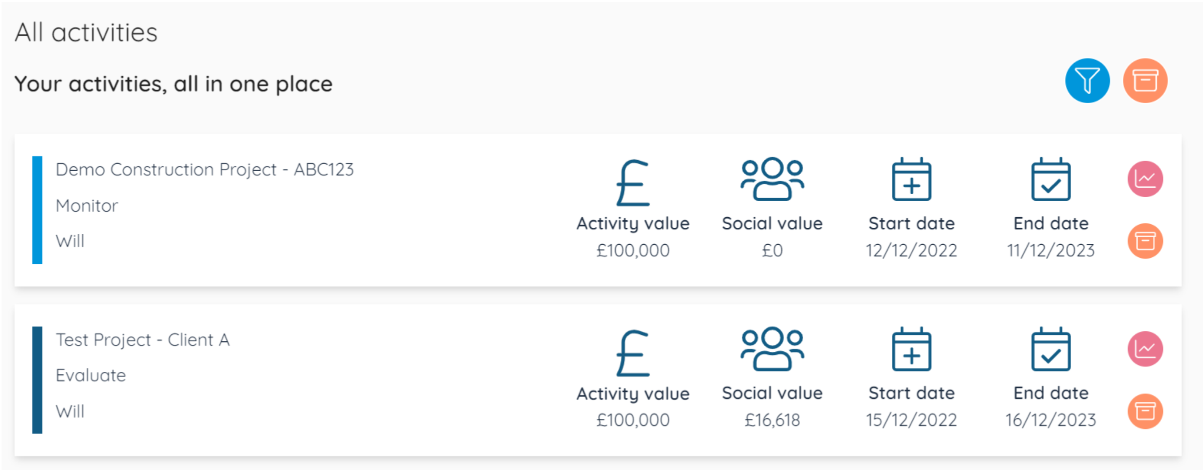
12. My Activities Overview

The ‘My activities’ section of the tool allows you to keep track of all your activities in one place, it also allows you to access and edit any activity that you might have ongoing. You can also see some top-level information such as the name of the activity, the total social value and length of the activity.

Firstly, to access ‘My activities’, navigate to the top left corner and click the four blue lines to bring up the main tool bar. Then on the tool bar click the ‘Activities’ tab and from the drop down underneath activities, select ‘My activities’ as shown in the example below.



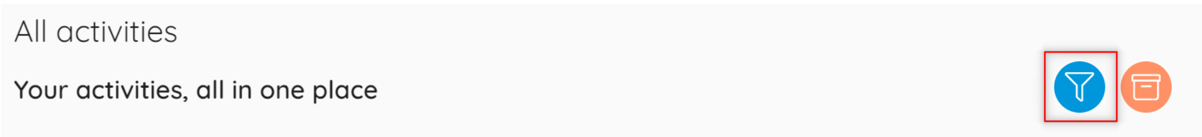
You will then be redirected to the ‘My activities’ page where you can access all your saved activities in one place. You can see an example of the ‘My activities’ page below.



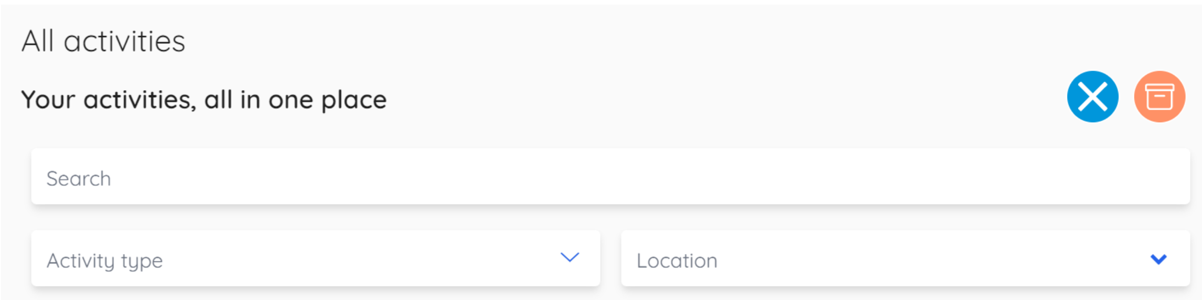
The next few sections will cover how to search and filter your activities, how to open, edit and archive an activity.

12.1 How to search/filter my activities

To search and filter all your activities, head to the 'My activities' page following the instructions covered in the previous section. Once you are on the activities page, in the top right corner there are two symbols, one blue and the other orange. The blue symbol will open the search bar and filters, you can see the correct symbol highlighted in red in the example below.



Once you click the blue filter button, three extra fields will appear just above your list of activities. There will be a search bar, an activity type filter, and a location filter as shown in the image below.

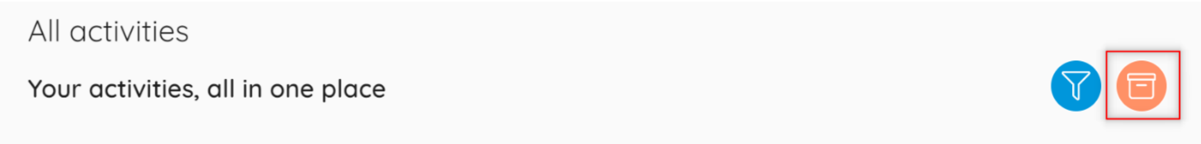


The search bar can be used to find activities using information such as the name of the activity, the name of the user who created the project and any unique reference used when creating an activity.

The activity type filter will allow you to filter through all of your activities by looking at either forecast, monitor or evaluation projects.

Lastly the location filter will allow you to search through your projects for a specific region, sub-region, or local authority.

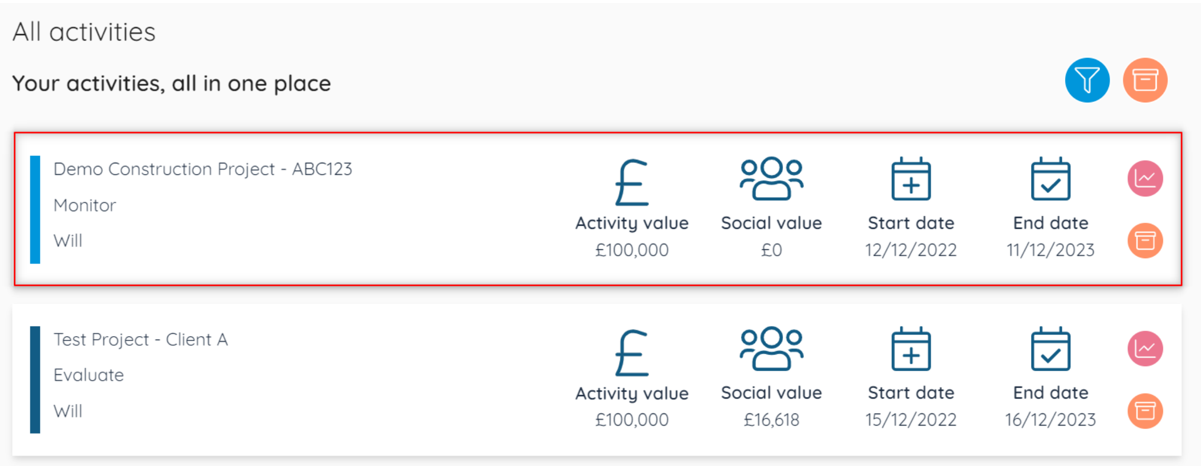
To close the search bar, click the blue 'X' button. You can also use the orange button with a folder in it to quickly change to your 'Archived activities as you can see highlighted in the image below.



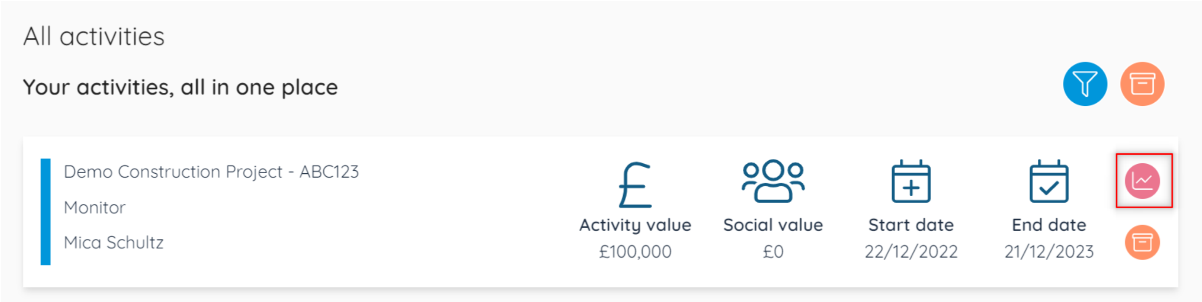
12.2 How to open/edit an activity

If you ever need to edit any metrics details, add data or download a report from a specific activity then you will need to open the project to be able to access the required sections. To open an activity, navigate to the 'My activities' section, full instructions on how to do this are shown in '[Section 12. My Activities Overview](#).

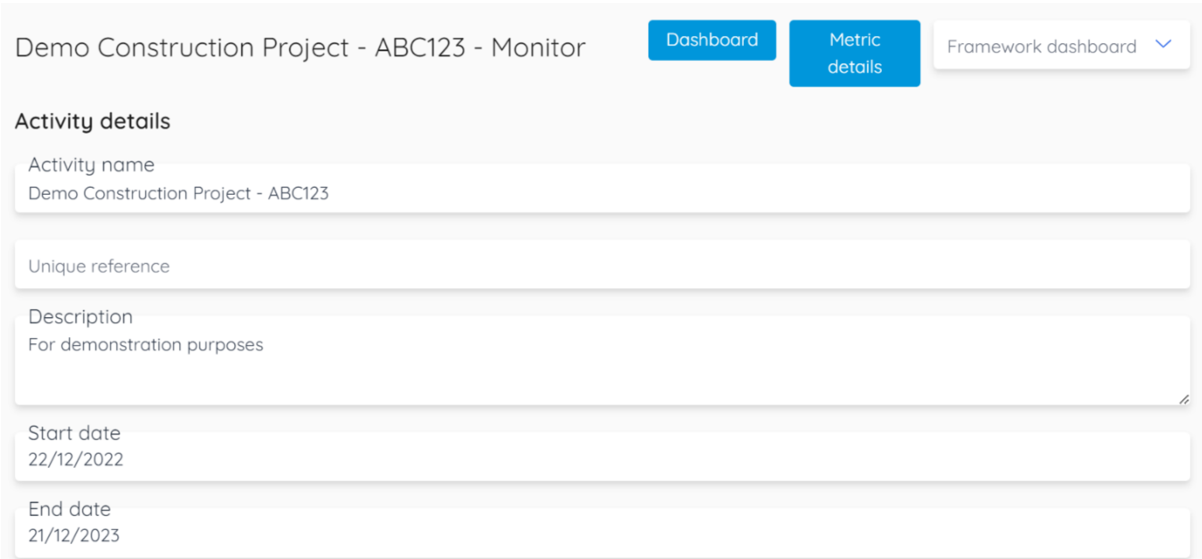
Once you've opened the 'My Activities' section and located the activity you wish to open/edit, simply click anywhere on the tab of that specific project tab and this will open the activity for you. As you can see in the example below, I have highlighted in red to show where you can click to open the activity.



You can also jump straight into the dashboard report of a specific activity by click the pink button with a graph icon on it as you can see highlighted in the image below.



Once you've clicked on your chosen activity, you will be redirected through to the activity details page where you have a few different options at the top and bottom of the page as you can see highlighted in the image below. Across the top of the page to the right hand side you can see three buttons, there is the 'Dashboard' button which will take you through to the dashboard report for this activity. You can also click the 'Metric details' button which will take you through to add, edit or delete any metrics to the activity. The final button is the 'Framework dashboard' this will allow you to access a report showcasing how the metrics you've added to your activity align to well-known social value frameworks such as the National TOM's and the Social Value Model.

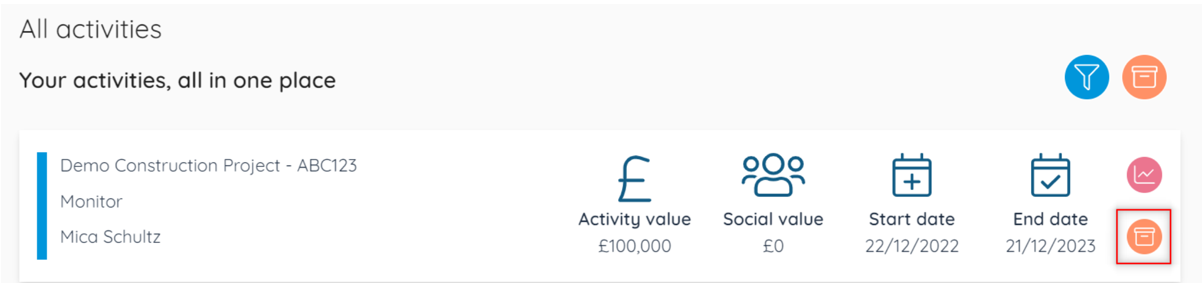


If you scroll down to the bottom of the page there are also a few other options available. As you can see in the image below there are three buttons, the first one is 'Go back' this will return you to the 'My Activities' page. The second option 'Edit activity' will allow you to edit the activity details and the metric details. Lastly the 'progress activity' option will allow you to move your activity through on to the next stage such as moving a forecast activity through to the monitor stage.

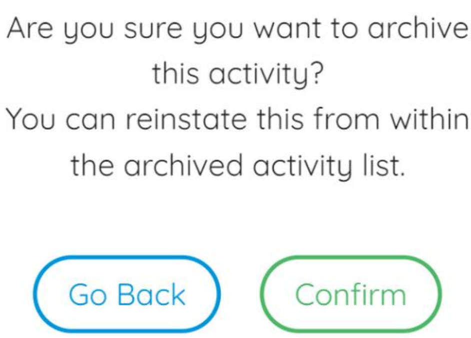
12.3 How to archive an activity.

The archiving function can be used to remove activities from the 'My activities' section, this can be used for example to remove forecast activities that may never have turned into a live project such as failed bids/tenders or fund applications etc. Please be aware, the data displayed on the main overview dashboard is pulled from the 'My activities' section, so any activity that is archived won't be displayed on the dashboard anymore.

To archive an activity, navigate to the 'My activities' section, for instructions on how to do this please refer to section [12. My Activities Overview.](#) Locate the activity that you wish to archive and on the right-hand side there is a small round orange button with a folder icon on it as you can see highlighted in the image below.



Once you click the archive button, a pop-up will appear asking 'Are you sure you want to archive this activity? You can reinstate this from within the archive activity list.' Click the green confirm button as shown in the example below and your activity will be archived and moved to the archived activities section.

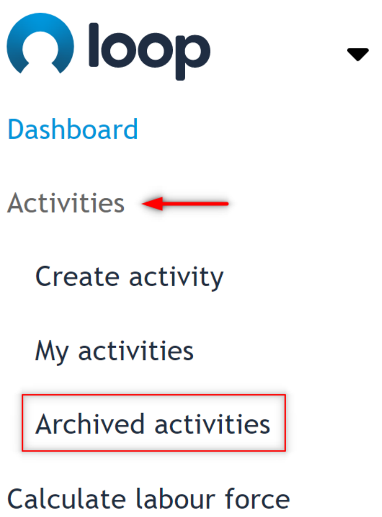


You can still access the activity after archiving if you need to download a report, please refer to section 13.2 How to access/edit an archived activity. You can also reinstate the activity at any point if you want the data to be displayed back on the main overview dashboard. For instructions on how to do this, please refer to section 13.3 How to reinstate an activity..

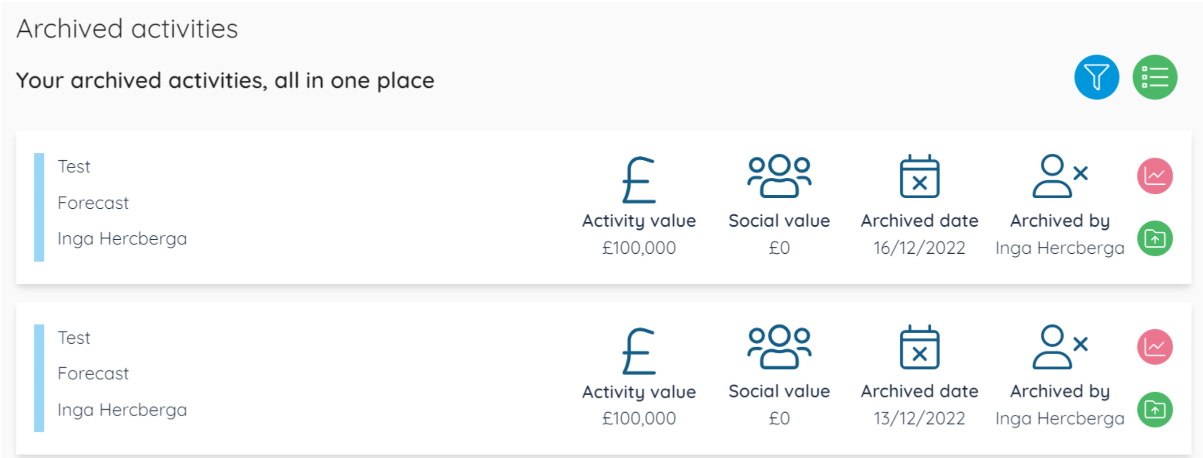
13. Archived Activities Overview

The ‘Archived activities’ section of the tool allows you to keep track of all your archived activities in one place, it also allows you to access and edit any activity that you might have archived. Any data from an activity that you have archived will not be shown on the main overview dashboard. You can also see some top-level information such as the name of the activity, the total social value, when it weas archived and who archived the activity.

Firstly, to access your archived activities, navigate to the top left corner and click the four blue lines to bring up the main tool bar. Then on the tool bar click the ‘Activities’ tab and from the drop down underneath activities, select ‘Archived activities’ as shown in the example below.



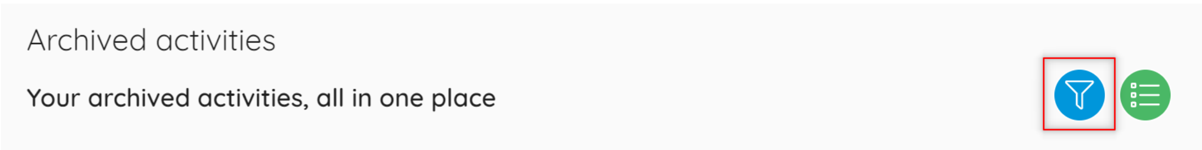
You will then be redirected to the ‘Archived activities’ page where you can access all the activities you’ve in one place. You can see an example of the ‘Archived activities’ page below.



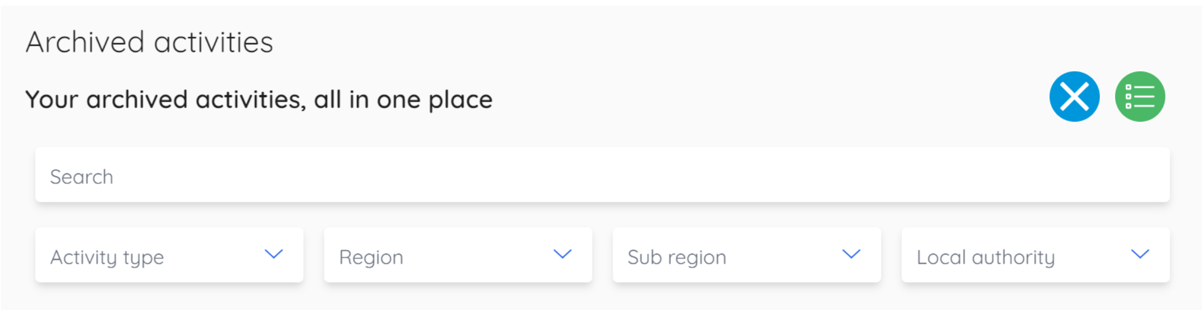
The next few sections will cover how to search and filter your archived activities, how to open, edit and reinstate an activity.

13.1 How to search/filter my archived activities

To search and filter all your archived activities, head to the 'Archived activities' page following the instructions covered in the previous section. Once you are on the archived activities page, in the top right corner there are two symbols, one blue and the other green. The blue symbol will open the search bar and filters, you can see the correct symbol highlighted in red in the example below.



Once you click the blue filter button, five extra fields will appear just above your list of archived activities. There will be a search bar, an activity type filter, and a location filter to choose a region, sub region or local authority as shown in the image below.

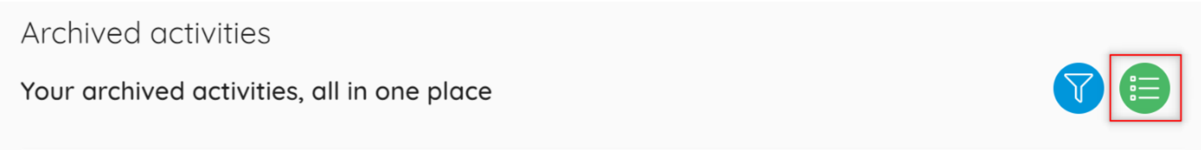


The search bar can be used to find activities using information such as the name of the activity, the name of the user who created the project and any unique reference used when creating an activity.

The activity type filter will allow you to filter through all of your activities by looking at either forecast, monitor or evaluation projects.

Lastly the location filters will allow you to search through your activities for a specific region, sub-region, or local authority.

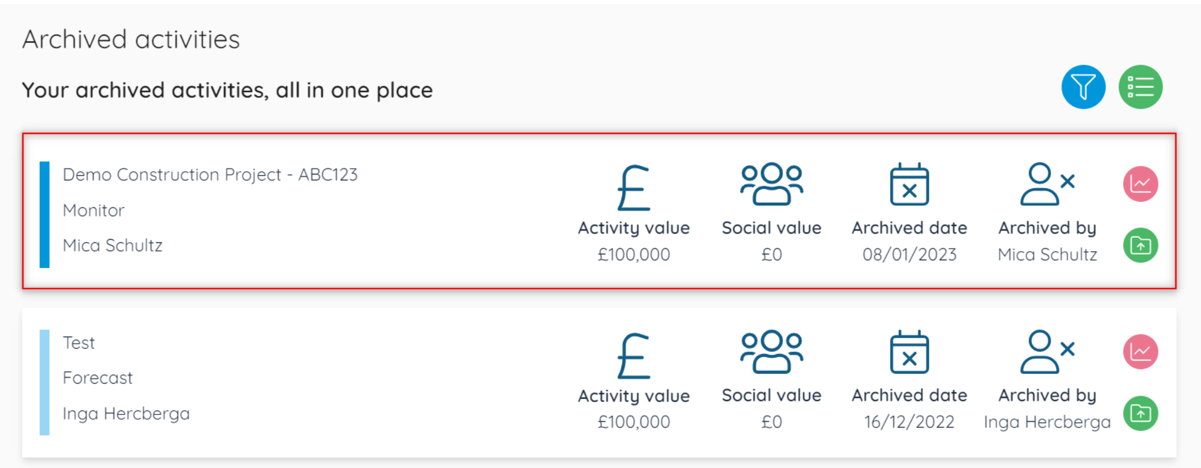
To close the search bar, click the blue ‘X’ button. You can also use the orange button with a folder in it to quickly change to your ‘Archived activities as you can see highlighted in the image below.



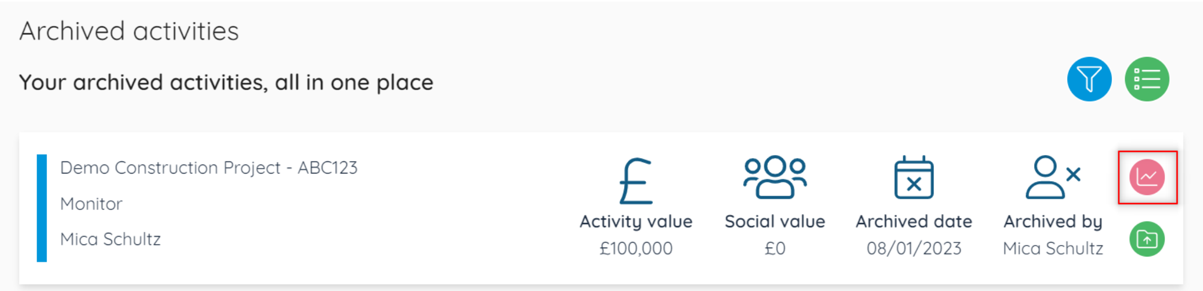
13.2 How to access/edit an archived activity

If you ever need to edit any metrics details, add data, or download a report from a specific archived activity then you will need to open the project to be able to access the required sections. To open an activity, navigate to the ‘Archived activities’ section, full instructions on how to do this are shown in ‘Section 13. Archived Activities Overview

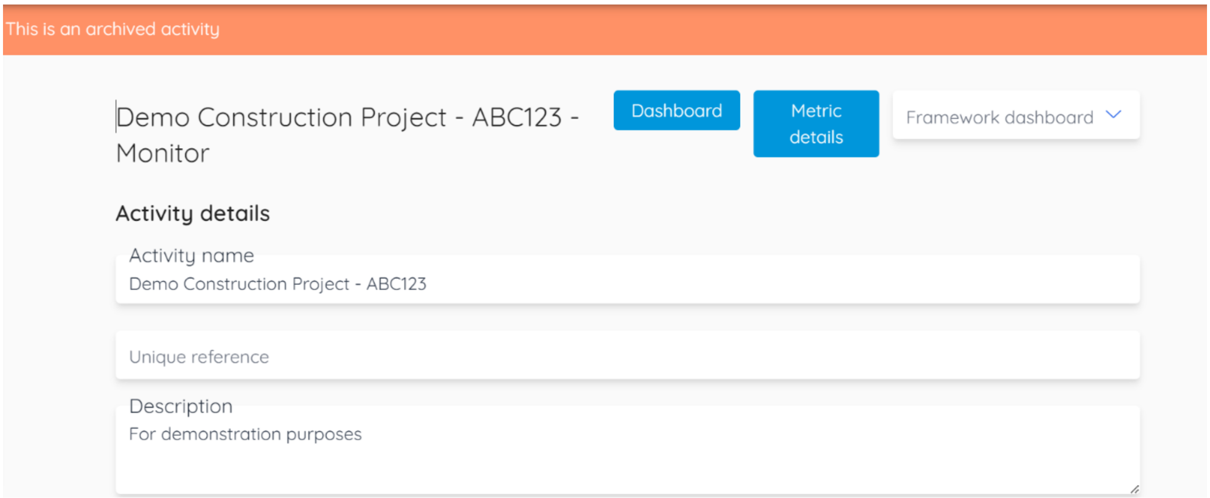
Once you’ve opened the ‘Archived Activities’ section and located the activity you wish to open/edit, simply click anywhere on the tab of that specific project tab and this will open the activity for you. As you can see in the example below, I have highlighted in red to show where you can click to open the activity.



You can also jump straight into the dashboard report of a specific activity by click the pink button with a graph icon on it as shown In the example below.



Once you've clicked on your chosen archived activity, you will be redirected through to the activity details page where you have a few different options at the top and bottom of the page as you can see highlighted in the image below. You can also see there is an orange banner just to remind you that the activity you are looking at has been archived.



Across the top of the page to the right-hand side you can see three buttons, there is the 'Dashboard' button which will take you through to the dashboard report for this activity. You can also click the 'Metric details' button which will take you through to add, edit or delete any metrics to the activity. The final button is the 'Framework dashboard' this will allow you to access a report showcasing how the metrics you've added to your activity align to well-known social value frameworks such as the National TOM's and the Social Value Model.

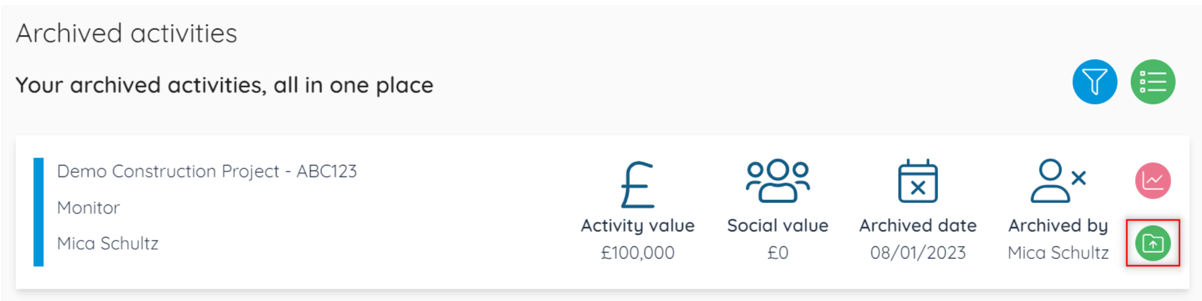
If you scroll down to the bottom of the page there are also a few other options available. As you can see in the image below there are two buttons, the first one is 'Go back' this will return you to the 'Archived

Activities' page. The second option is 'Reinstate'. This will allow you to unarchive your activity and reinstate it as a live activity.

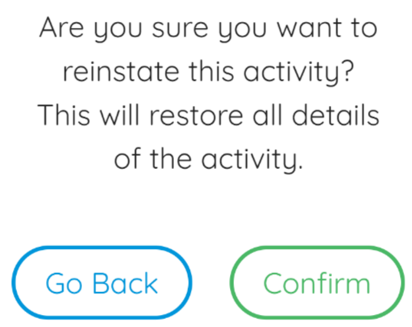
13.3 How to reinstate an activity.

The reinstating function can be used to unarchive activities from the 'Archived activities' section. Please be aware, the data from your activities that you are reinstating will be readded to the main overview dashboard.

To reinstate an activity, navigate to the 'Archived activities' section, (for instructions on how to do this please refer to section 13. Archived Activities Overview.) and locate the activity that you wish to reinstate. On the right-hand side there is a small round green button with a folder and an arrow icon on it, as you can see highlighted in the image below.



Once you click the reinstate button, a pop-up will appear asking 'Are you sure you want to reinstate this activity? This will restore all details of the activity.' Click the green confirm button as shown in the example below and your activity will be reinstated and moved to the 'My activities' section.



You can also reinstate an archived activity from the ‘Activity details’ page, simply scroll to the bottom of the page and click the green ‘Reinstate’ button as shown in the image below.

Again, once you click the reinstate button, a pop-up will appear asking ‘Are you sure you want to reinstate this activity? This will restore all details of the activity.’ Click the green confirm button as shown in the example below and your activity will be reinstated and moved to the ‘My activities’ section.

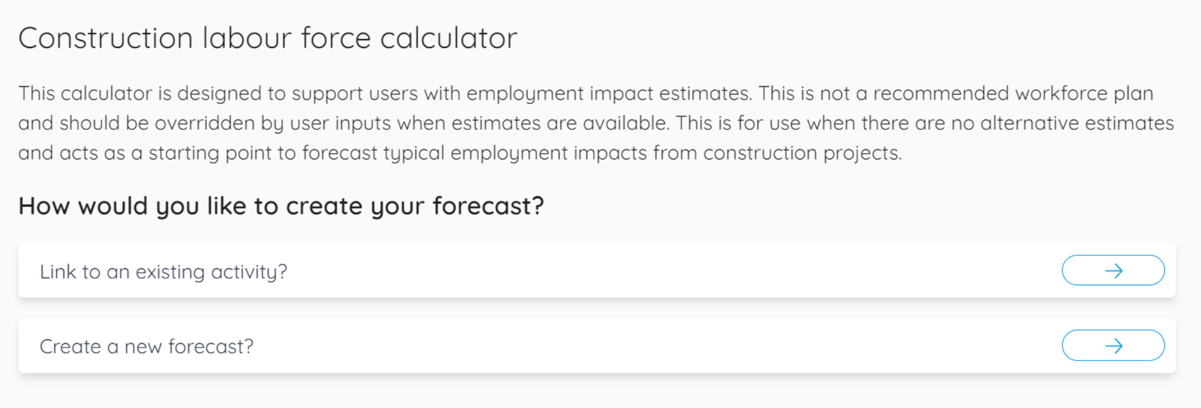
14. Calculate Labour Force

The ‘Calculate Labour Force’ section of the software is designed to support users in the construction industry with employment impact estimates. The calculator can estimate the number of people needed for a specific construction project. This is not a recommended workforce plan and should be overridden by user input when estimates are available. This is for use when there are no alternative estimates and acts as a starting point to forecast typical employment impacts from construction projects.

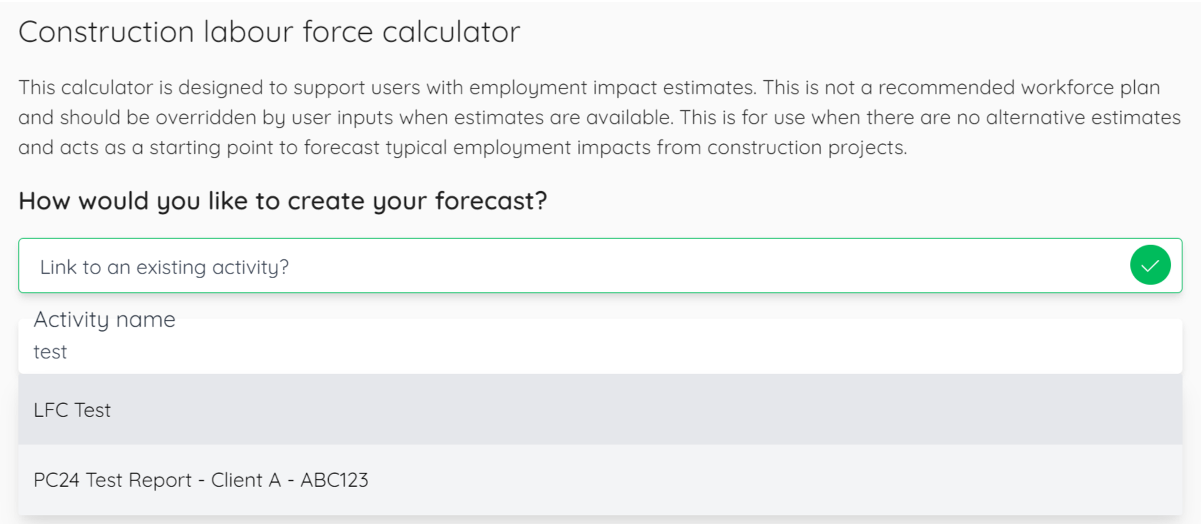
Start by clicking ‘Calculate labour force’ on the main tool bar, for instructions on how to do this please refer to ‘Section [14. Calculate Labour Force.](#)

You will then be redirected to the construction labour force calculator, the first thing to do is to decide ‘How would you like to create your forecast?’

you can either link to an existing activity or you can create a new forecast as you can see in the example below.

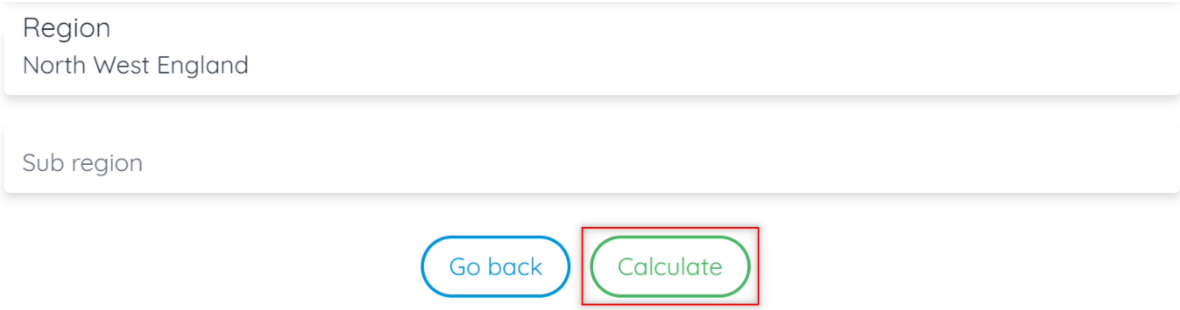


Firstly, I'll show you how to link to an existing activity. Start by clicking the 'Link to an existing activity?' tab and a pop up will appear below labelled 'Activity name'. In this field start searching your activities for any forecast activities you have set up previously, as you can see in the example below, I have searched for test, and chosen 'LFC Test' from the list.

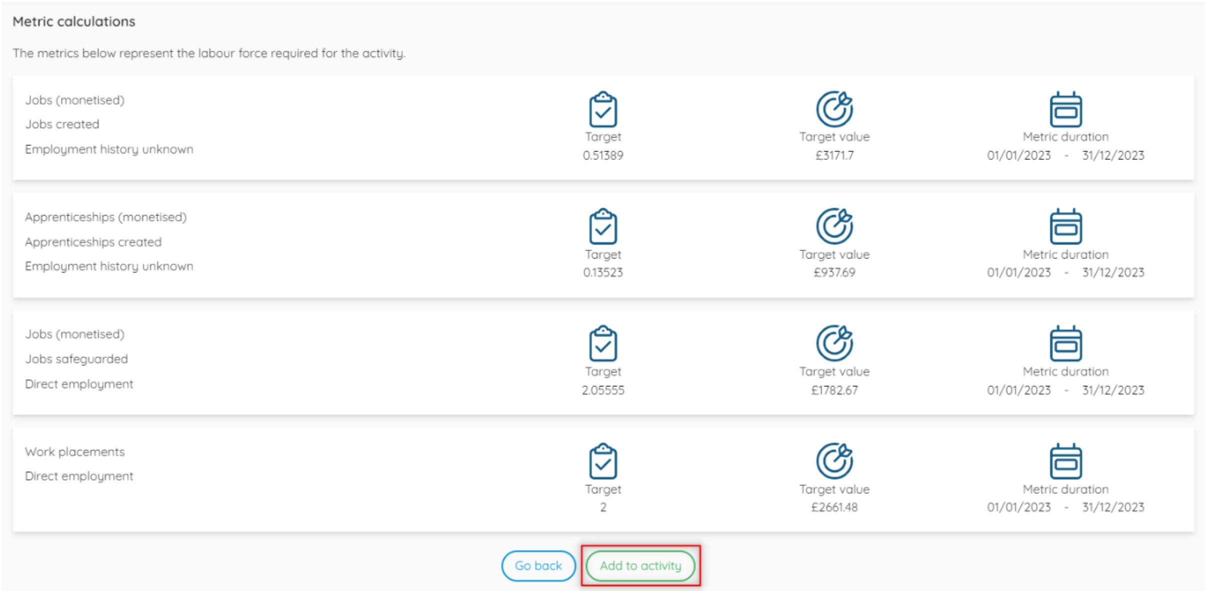


Once you have selected your existing activity, the activity details will fill in automatically below from your existing activity. These details are used to forecast the required labour force for construction projects.

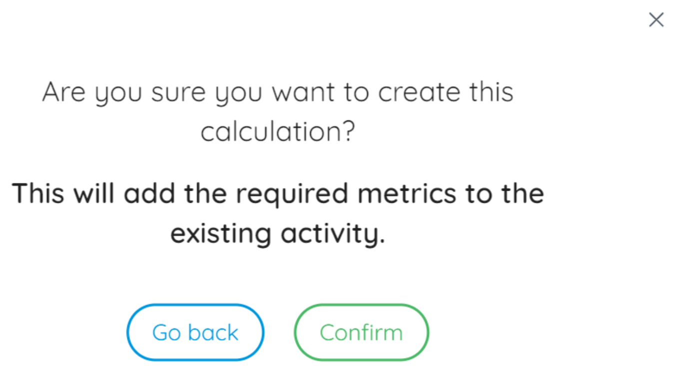
Once you are happy with the activity details from your existing activity, scroll down to the bottom of the page and click the green 'Calculate' button as you can see in the image below.



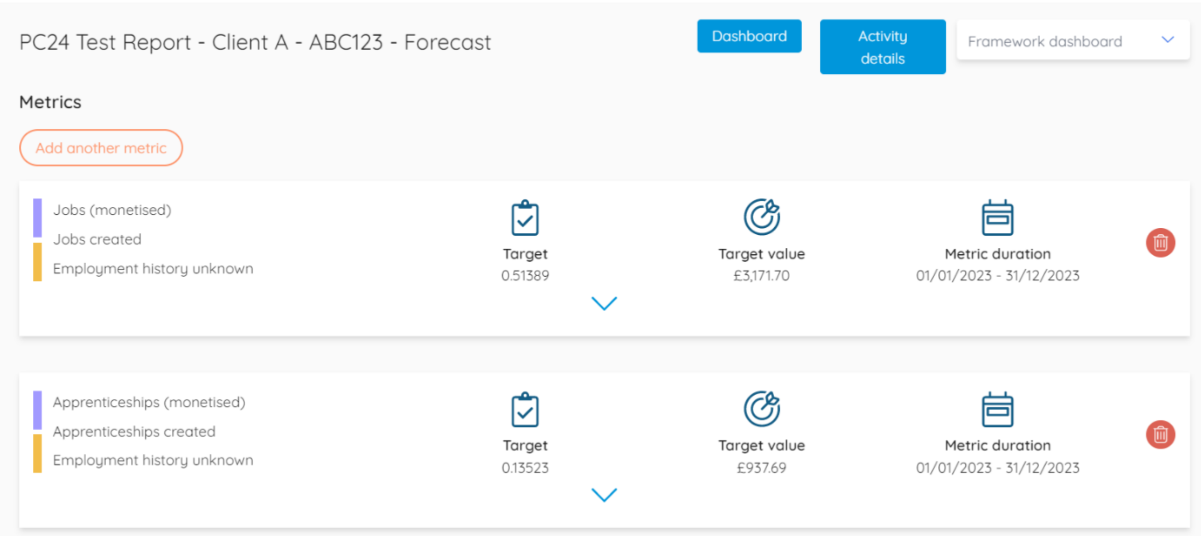
Once you click ‘Calculate’ the software will estimate the average labour needed across four different metrics. It will forecast the typical employment impacts for ‘Jobs created’, ‘Apprenticeships created’, ‘Jobs safeguarded’ and ‘Work placements’ for your chosen project. As you can see in the example below it has forecast the four metrics with the target output and target value shown.



Once you have done the labour force calculations scroll to the bottom of the page and click the green button labelled ‘Add to activity’ as you can see highlighted in the image above. Once you click ‘Add to activity’ a pop-up will appear asking ‘Are you sure you want to create this calculation? This will add the required metrics to the existing activity.’ Simply click the green ‘Confirm’ button at the bottom of the pop-up as you cand the forecast labour metrics will be added to your activity.

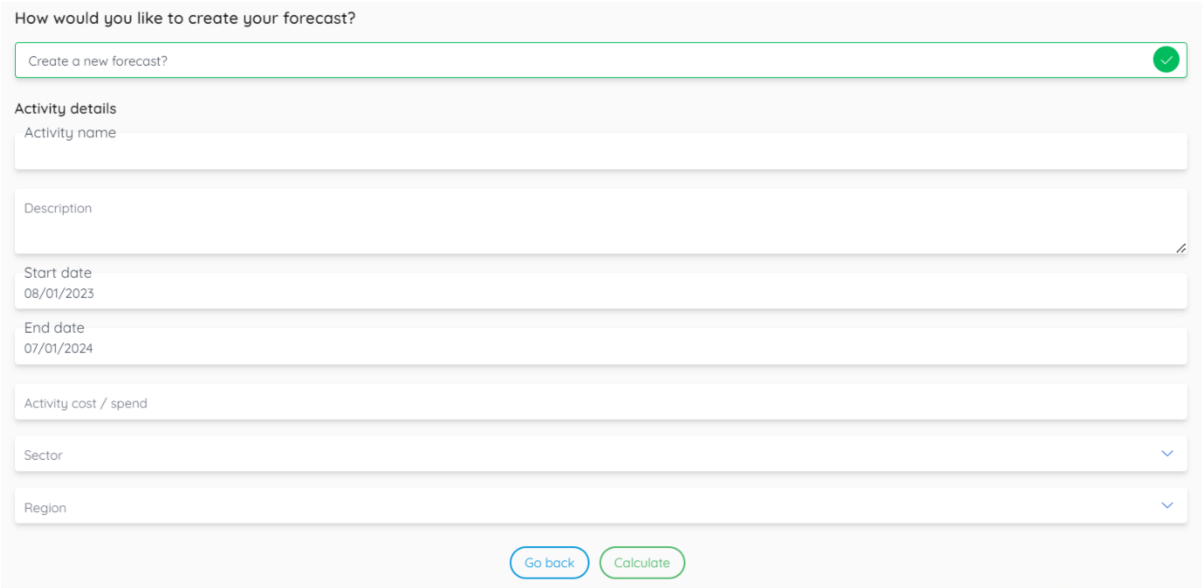


Once you click confirm, you will be redirected to the metric details page of your chosen activity. You will be able to see that the labour forecast metric calculations have now been added to your existing activity under metrics as you can see in the image below.



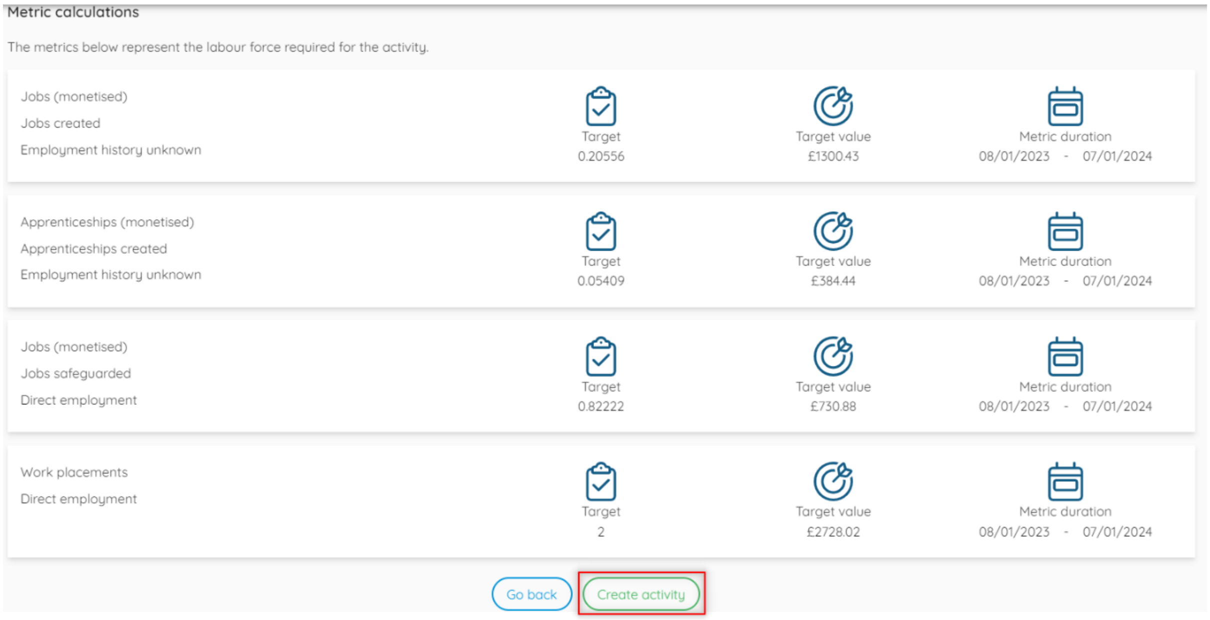
Your labour forecast calculations have now been completed and added to your existing activity.

You can also use the labour force calculator to create a new forecast activity rather than using an existing one. Open the labour force calculator through the main tool bar and click the second option labelled ‘Create a new forecast?’. Once you’ve clicked the second option, fields will appear below for you to fill In the activity details of your labor force forecast as you can see in the example below.

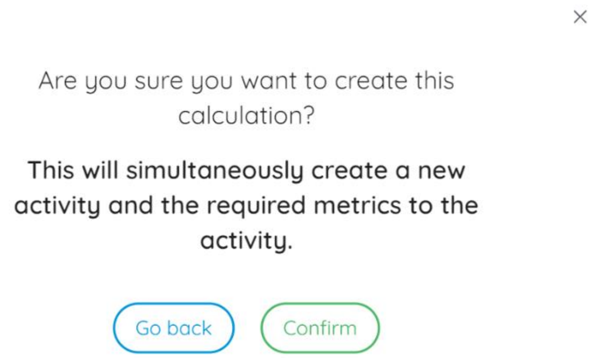


Once you've filled in the activity details for your labour force forecast, for instructions on how to do this please refer to Section 8.1 Activity Details scroll to the bottom of the page and click the green 'Calculate' button. You can see an example of this below.

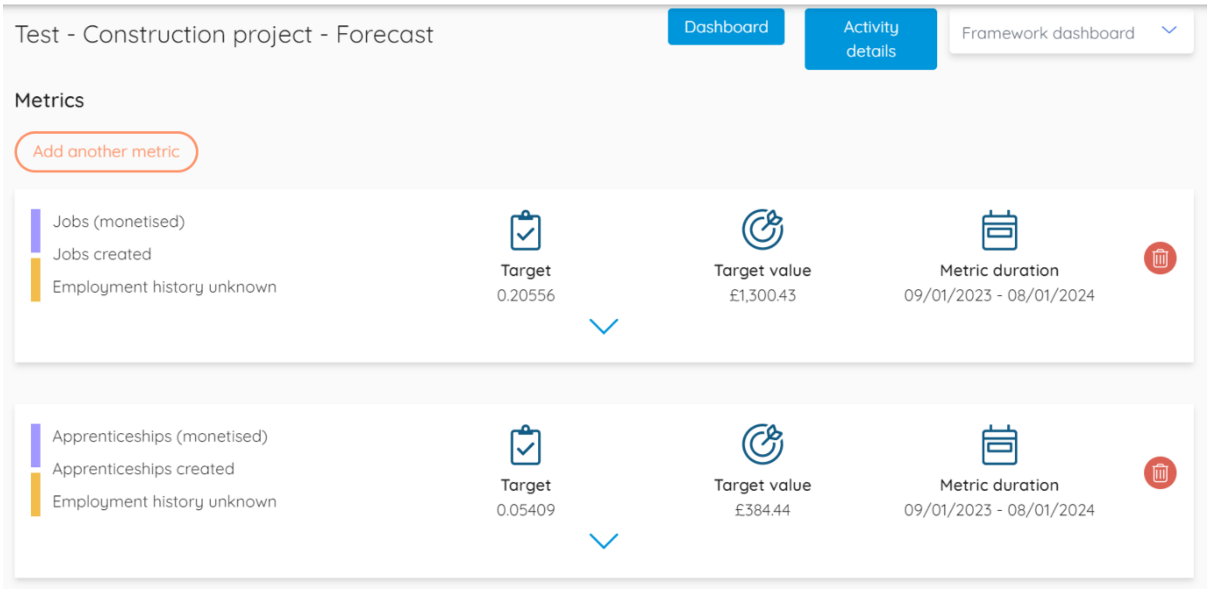
Once you click 'Calculate' the software will estimate the average labour needed across four different metrics. It will forecast the typical employment impacts for 'Jobs created', 'Apprenticeships created', 'Jobs safeguarded' and 'Work placements' for your chosen project. As you can see in the example below it has forecast the four metrics with the target output and target value shown.



Once you have done the labour force calculations scroll to the bottom of the page and click the green button labelled ‘Create activity’ as you can see highlighted in the image above. Once you click ‘Create activity’ a pop-up will appear asking ‘Are you sure you want to create this calculation? This will simultaneously create a new activity and the required metrics to the activity’. Simply click the green ‘Confirm’ button at the bottom of the pop-up as you can see in the image below.



Your new forecast activity has now been created and the labour force metrics have been added to your new activity as you can see in the example below.



15. Lasting Legacy

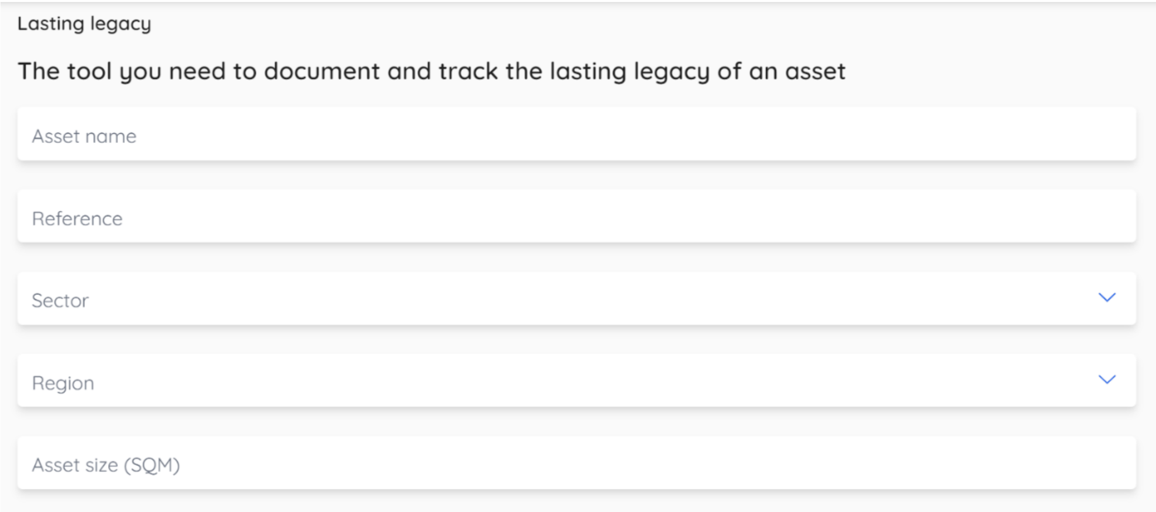
The Lasting Legacy module of the software allows you to document and track the value the construction of a particular asset will bring over a 50-year period, to a certain location or community.

The next few sections will show you how to create and archive an asset as well as how to access a hub for all your assets.

15.1 Creating an Asset

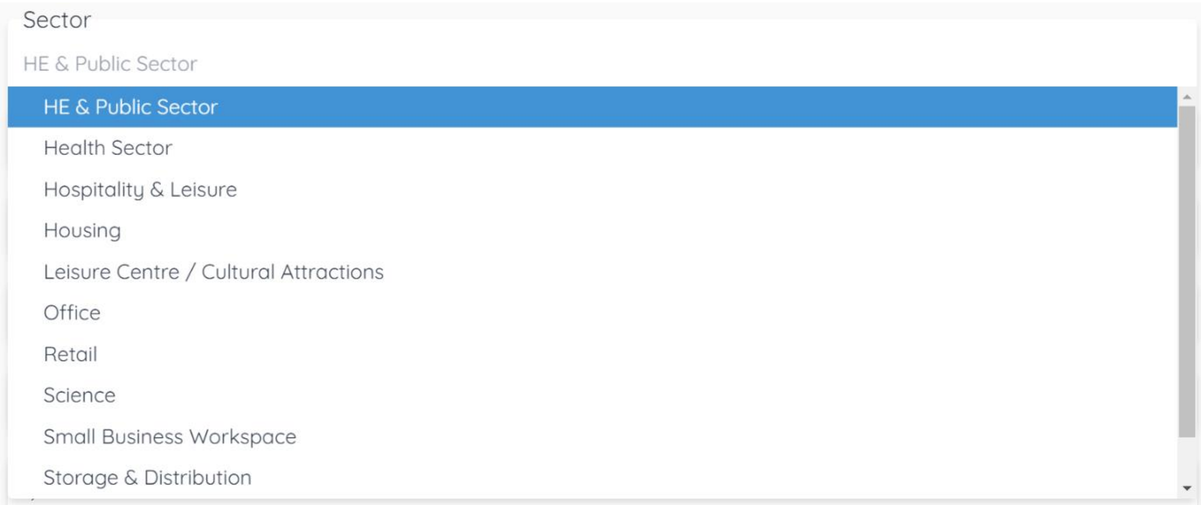
To begin calculating the lasting legacy of an asset, you will need to navigate to the main tool bar and click on 'Lasting Legacy', if you require full instructions on how to do this please refer to Section 15. Lasting Legacy.

You will then be redirected to the Lasting Legacy page as you can see in the image below, from here we can begin to enter information about the asset that will allow the software to calculate the operational value.

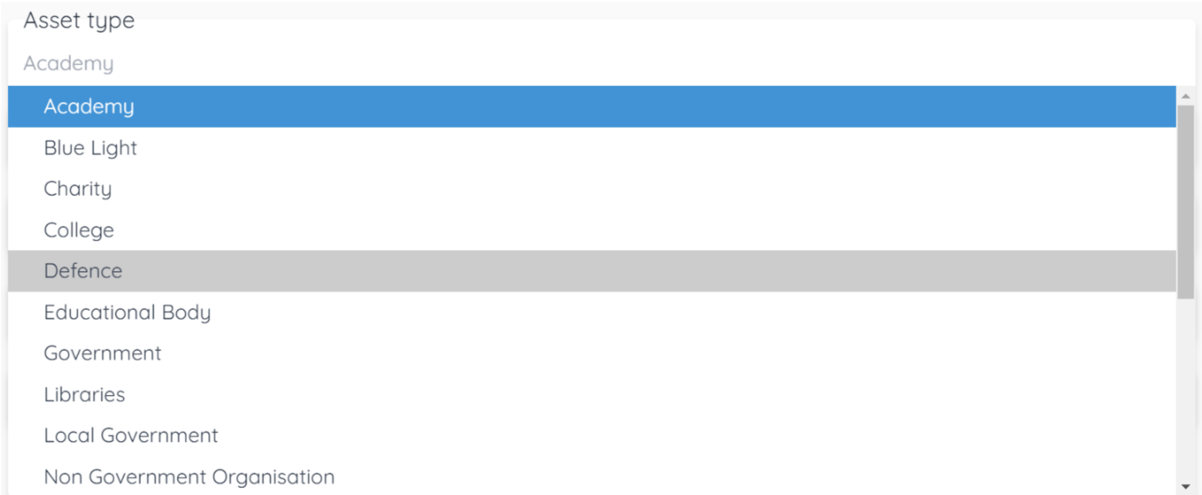


As you can see in the image above, firstly, you will need to enter an ‘Asset name’, the second field for a reference isn’t mandatory but will allow you to add an internal reference to the asset that you will be able to search for at a later point.

Next you will need to choose the ‘Sector’ for the asset you are constructing, as you can see in the example below there are a range of sectors from ‘Higher Education & Public sector’ through to ‘Technology’.



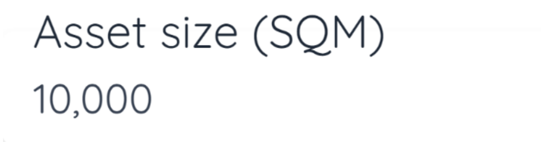
Once you’ve chosen you desired sector, the next field will be to choose the ‘Asset type’ from your chosen sector. In this example, I have chosen ‘HE & Public sector’, you can now see in the image below the asset types available in the list relate to this sector. Ranging from ‘Academy’ to ‘University’ in this example we will be choosing academy.



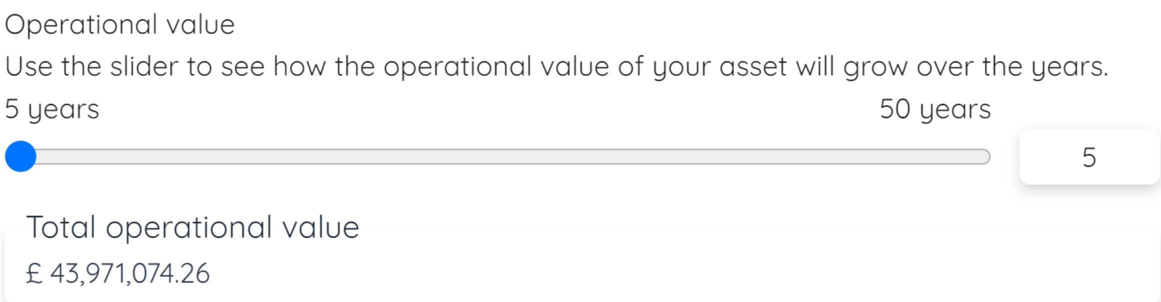
Once you've decided on the 'Sector' and 'Asset type' you will need to set the location of the asset by choosing a region, sub-region and local authority. The software will then take into account the level of deprivation for you chosen location and thus amend the value created.

Simply choose the correct region from the drop-down list, and the subsequent sub-region and local authority for where the asset is/will be based.

Now that you've filled in previous fields, the last field to fill in is the 'Asset type' and this needs to be done in Square metres (SQM) as you can see in the example below I've used dummy data for a 10,000SQM Academy.

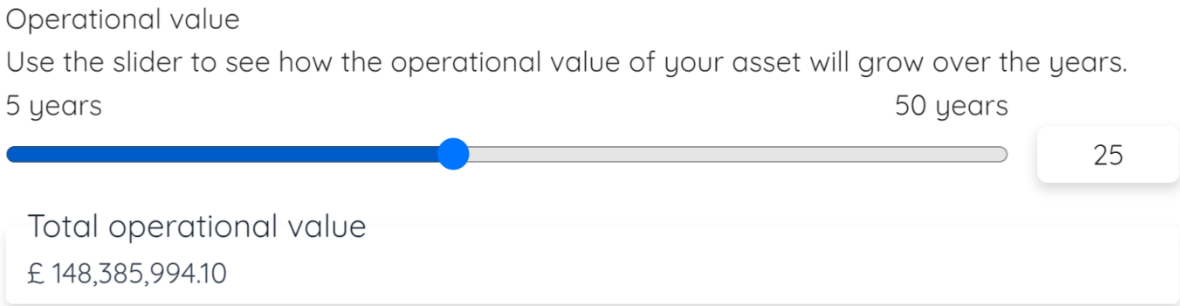


Once you've filled in all the fields we have just been through, the 'Lasting Legacy' over an initial 5 year period will appear below under the 'Operational Value. As you can see in the image below there is a slider you can use 'to see how the operational value of your asset will grow over the years.'



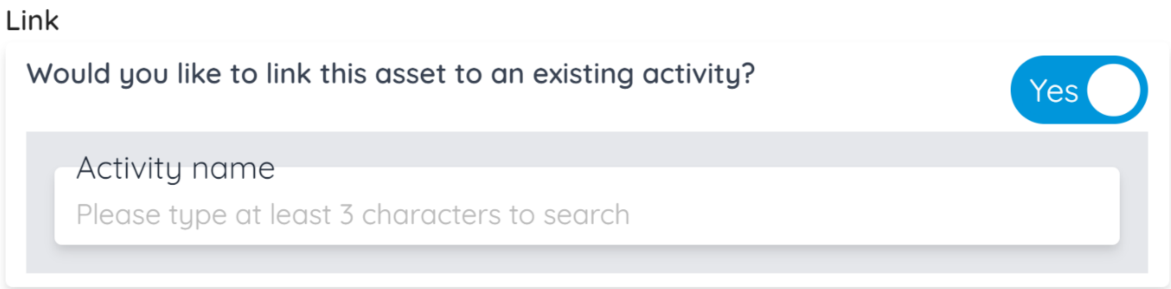
The slider can be used to see the operational value of your asset every 5 years over a 50-year period. Simply move the slider to the desired length of time and the 'Total operational value' will change to show the value.

As you can see in the example below, I have now moved the slider to 25 years and the 'Total operational value' has now increased to showcase this over a 25-year period.

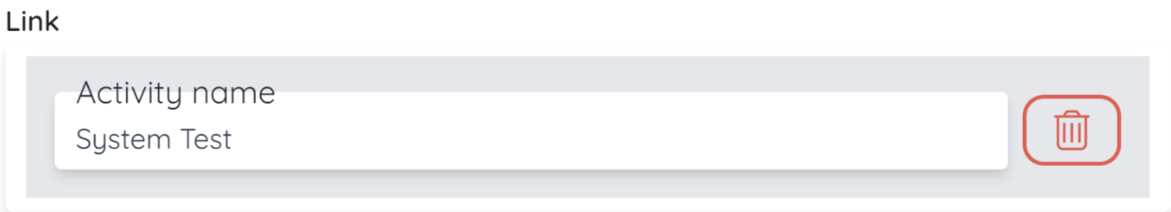


Once you've set the time period for your assets' operational value, there are two last fields that are both optional but allow you to link your asset to a particular project and attach evidence to the asset.

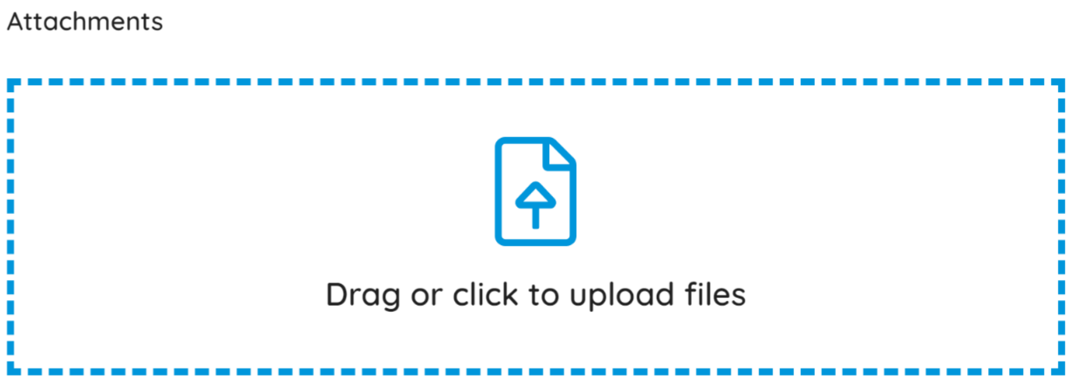
Firstly you can link the asset to a certain project, this might be the project you added to the system for the construction of said asset. As you can see in the image below, click the toggle on the right-hand side next to where it says, 'Would you like to link this asset to an existing activity?'. A field will then appear below for you to search through your projects by an 'Activity name'.



Once you've searched your activities and found the correct one from the list, select the activity and once you save your asset it will be linked to your chosen activity. As you can see in the image below I have selected to link my asset to 'System Test' activity.

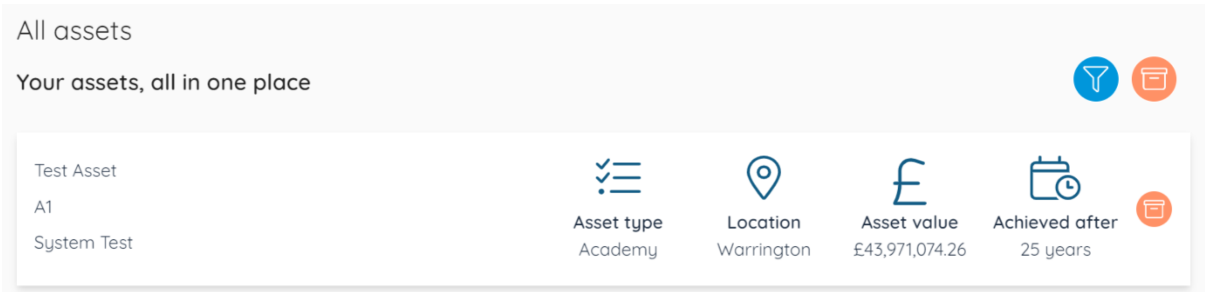


Lastly, you can attach any evidence to your asset before saving, at the bottom of the page there will be a blue dotted box that says 'Drag or click to upload files', you can see an example of this below. This is not mandatory but advised.



Now that you've added any evidence to link to your asset, scroll a little further down the page and click the green 'Create button' as you can see in the screenshot below.

Once you click 'Create' your asset will be created and saved, you will be redirected to the 'My Assets' page and your asset will now be saved here. You can now access this asset at any point to make any amendments, check the asset value etc.

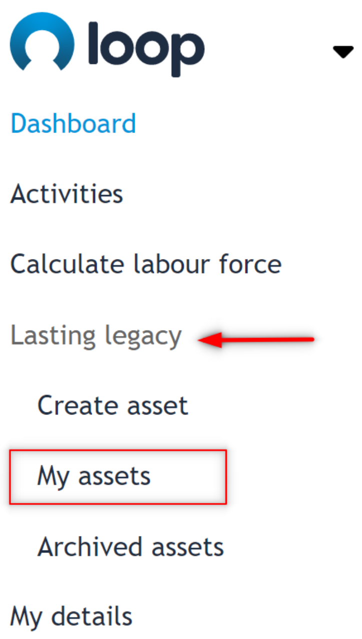


The next section will talk in more detail through the 'My Assets' page, how to search and filter, edit assets and how to archive them.

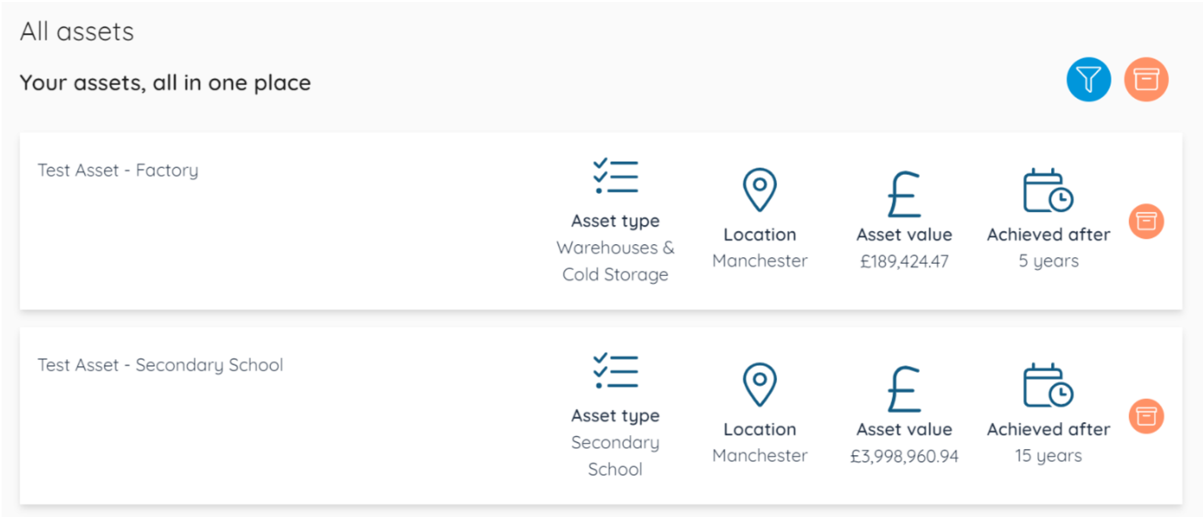
15.2 My Assets

The 'My Assets' section of the tool allows you to keep track of all your assets in one place, it also allows you to access and edit any activity that you might have ongoing. You can also see some top-level information such as the name of the activity, which activity its linked to, the asset value and how long it will take to achieve the operational value. This section will cover how to search and edit your assets and how to archive assets.

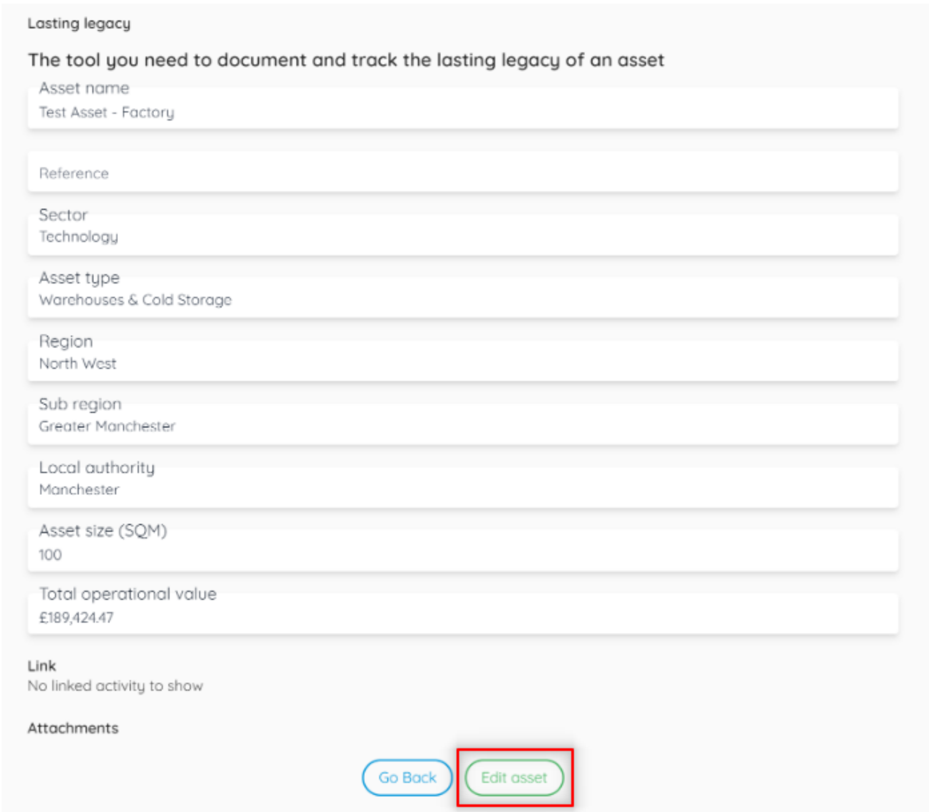
Firstly, to access 'My assets', navigate to the top left corner and click the four blue lines to bring up the main tool bar. Then on the tool bar click the 'Lasting Legacy' tab and from the drop down underneath, select 'My assets' as shown in the example below.



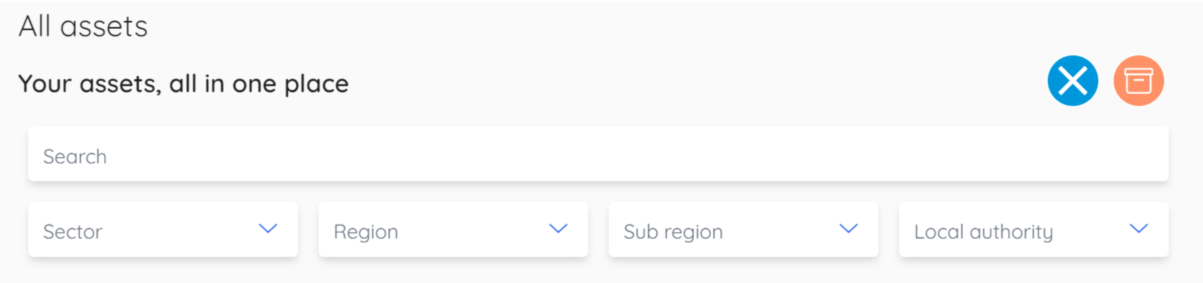
You will then be redirected to the 'My assets' page where you can access all your saved activities in one place. You can see an example of the 'My assets ' page below.



To access or edit one of your assets simply click anywhere on the tab for your chosen asset and you will be redirected to the asset's details page. Scroll to the bottom of the page and click the green 'Edit asset' button as highlighted in the screenshot below.



You can then make changes to your asset and recalculate the operational value created, for steps on how to do this please refer back to Section 15.1 Creating an Asset. If you need to search for a particular asset you can use the search bar which can be accessed by clicking the blue circle icon at the top of the page. This will then drop a search bar and a few filters which can be seen in the example below.

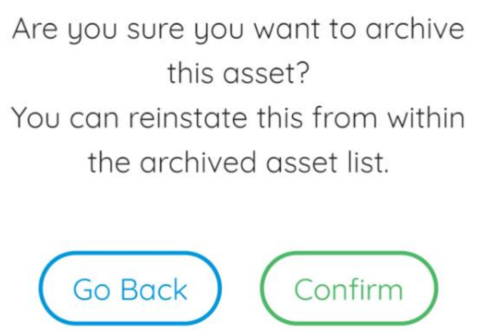


You can filter by sectors which your assets relate to such as health sector or housing. You can also search by the location of the asset by choosing a region, sub-region or local authority. To close the search bar, click the blue circle icon again in the top right corner that has an 'X' on it.

15.3 How to Archive an Asset

To archive an asset, navigate to the 'My assets' page and locate the asset that you wish to archive, for instructions on how to do this please refer to section 15.2 My Assets. On the asset tab move to the right-hand side and click the orange icon with a box inside it, as you can see highlighted in the image below.

Once you click the archive button a pop-up will appear asking 'Are you sure you want to archive this asset? You can reinstate this from within the archived asset list.'

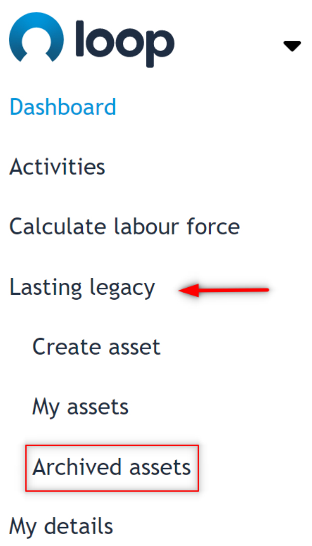


Click the green 'confirm' button and your asset will be archived and moved to the archived assets list.

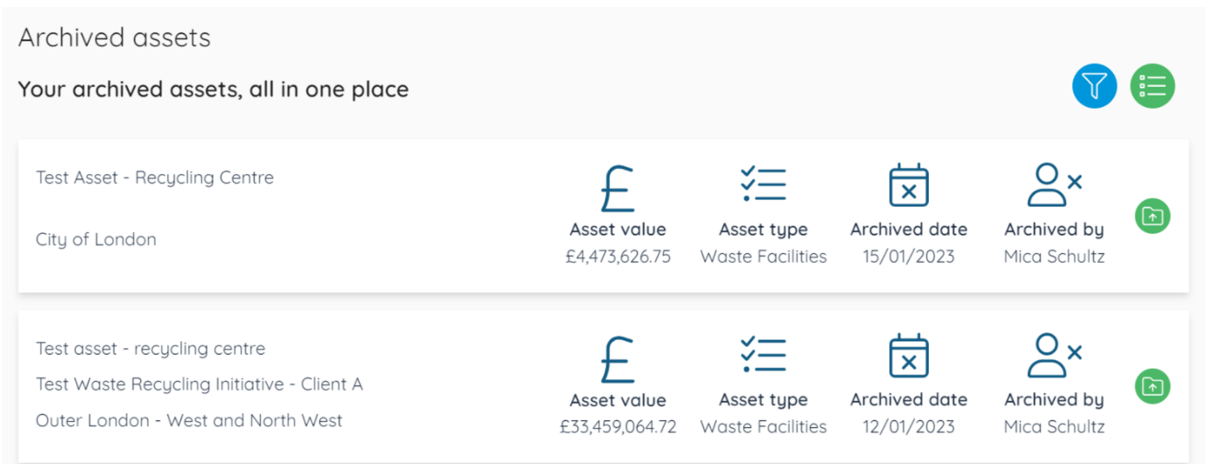
The next section will cover the archived assets and how to reinstate and asset.

15.4 Archived Assets

Firstly, to access 'Archived assets', navigate to the top left corner and click the four blue lines to bring up the main tool bar. Then on the tool bar click the 'Lasting Legacy' tab and from the drop down underneath, select 'Archived assets' as shown in the example below.

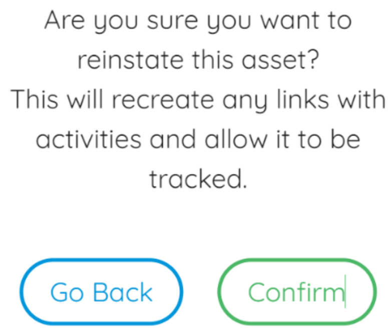


You will then be redirected to the 'Archived assets' page where you can access all your archived activities in one place. You can see an example of the 'Archived assets ' page below.



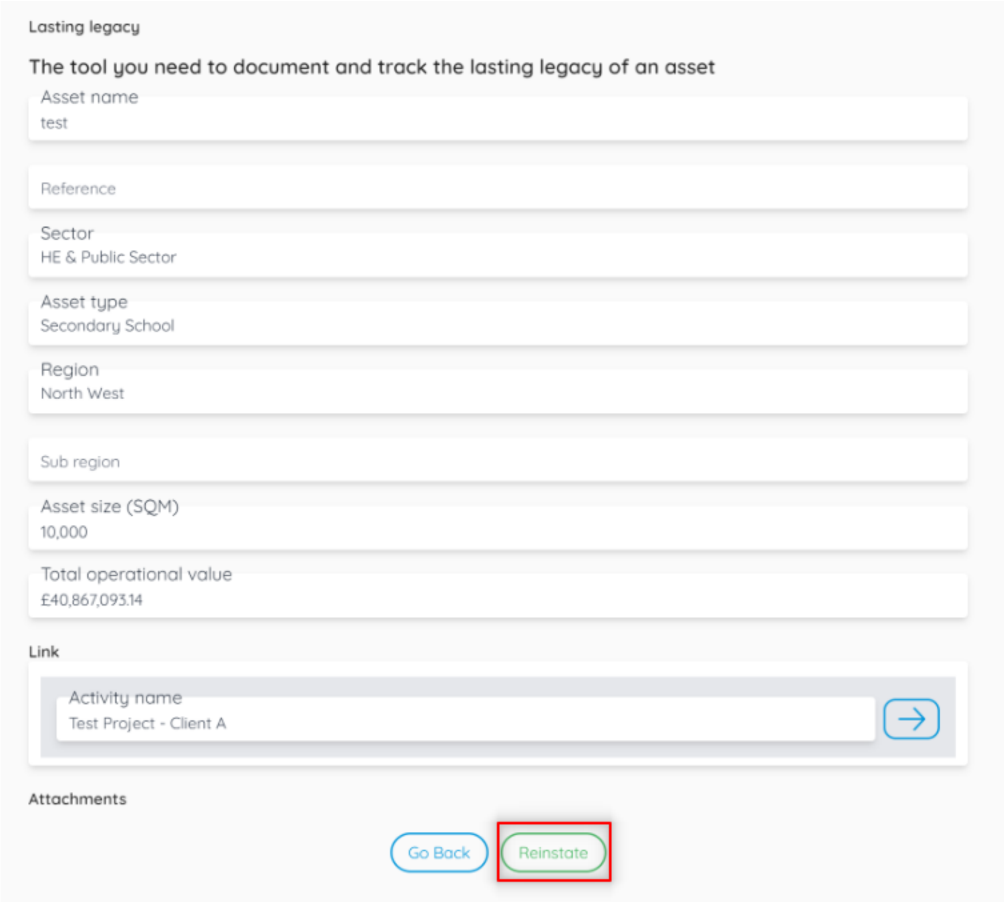
To reinstate one of your assets there are two options available. The first option is to simply click the green icon with a folder on the far right side of the asset you wish to reinstate as highlighted in red in the image below.

Once you click the reinstate icon a pop up will appear advising ‘Are you sure you want to reinstate this asset? This will recreate any links with activities and allow it to be tracked.’ You can see an example below.



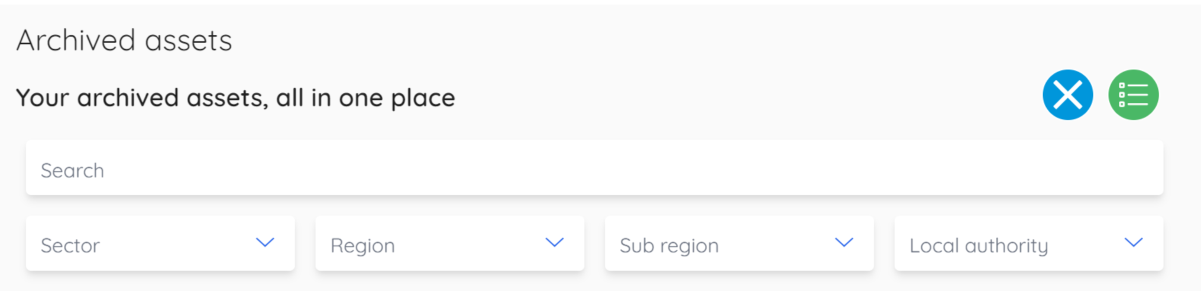
Simply click the green ‘Confirm’ button and your activity will be reinstated and added back to the ‘My assets’ page.

The other option for reinstating an activity is to click anywhere on the tab for your chosen asset and you will be redirected to the asset’s details page. Scroll to the bottom of the page and click the green ‘reinstate’ button as highlighted in the screenshot below.



You will receive the same pop up asking to confirm the reinstatement of your activity and it will be returned to 'My assets' page.

If you need to search for a particular archived asset you can use the search bar which can be accessed by clicking the blue circle icon at the top of the page. This will then drop a search bar and a few filters which can be seen in the example below.



You can filter by sectors which your archived assets relate to such as health sector or housing. You can also search by the location of the archived asset by choosing a region, sub-region or local authority. To close the search bar, click the blue circle icon again in the top right corner that has an 'X' on it.

16. Download links

16.1 National Social Value Standard - Guide

The National Social Value Standard (SVS) guide provides an overview of the National Social Value Standard (SVS), which is a measurement framework for the appraisal of social value – at the forecasting, monitoring, and evaluation stages.

Within the guidance document, the following topics are covered:

- The context around the framework – the recent history of social value in the UK, how the framework defines social value, and the purpose of the SVS.
- More details on the framework itself – its scope, uses, and alignment with other frameworks.
- The principles behind the framework.
- An overview of the metrics – the structure and different types of metrics.
- The monetisation of the metrics – the benefits of monetisation and how the SVS approaches it.
- A full list of the metrics, with definitions.

To download the full guide please go to the following link:

https://nationalsvs.co.uk/guidance/

16.2 National Social Value Standard – Full list of metrics

The National Social Value Standard includes over eight hundred metrics.

Backed and researched by qualified and experienced economists, our metrics cover everything ranging from social, environmental, and economic.

The metrics are grouped into five areas:

- Jobs, apprenticeships, and placements
- Workforce wellbeing, training and skills
- Supply chain
- Community, charity, and other stakeholders

- Environmental

They are designed to be broad and adaptable for a variety of uses by private, public, and non-profit organisations.

To download the full list of metrics with definitions please go to the following link:

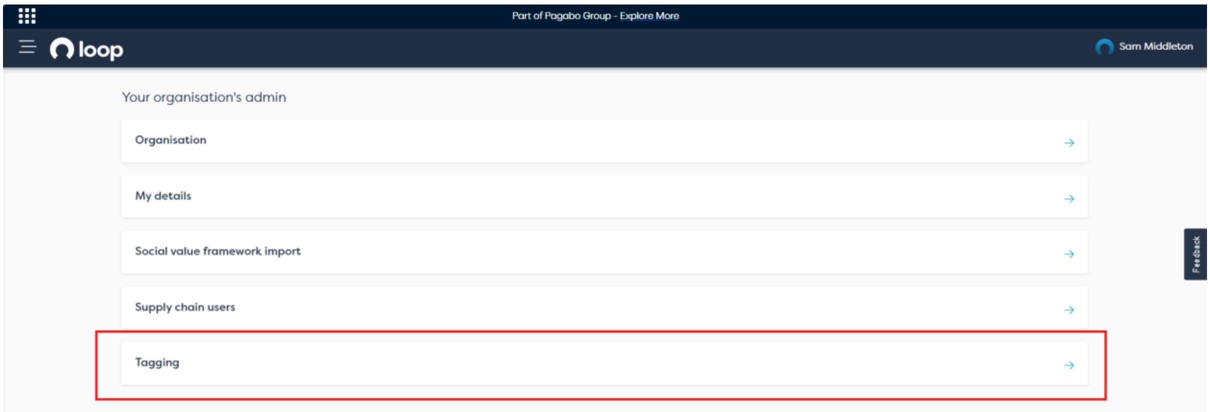
https://nationalsvs.co.uk/metrics/

17. Tagging

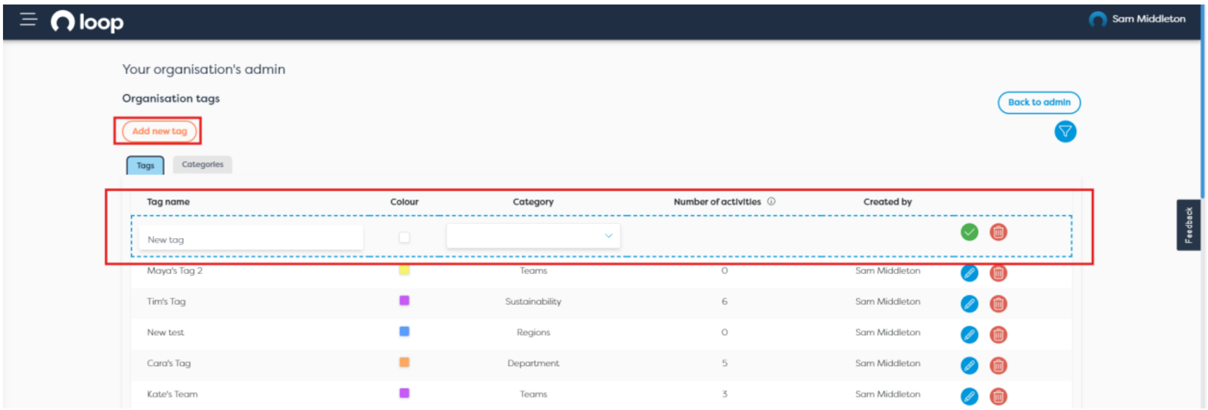
17.1 How to create a Tag

Tagging is a feature that allows you to 'Tag' an Activity or Metric with a specific keyword or phrase, that can then be found using various filters throughout the platform, to group together those activities tagged with the selected keyword for faster and more efficient project management and ease of reporting.

To create a tag simply enter the 'Admin' section on the menu, and select the 'Tagging' option.

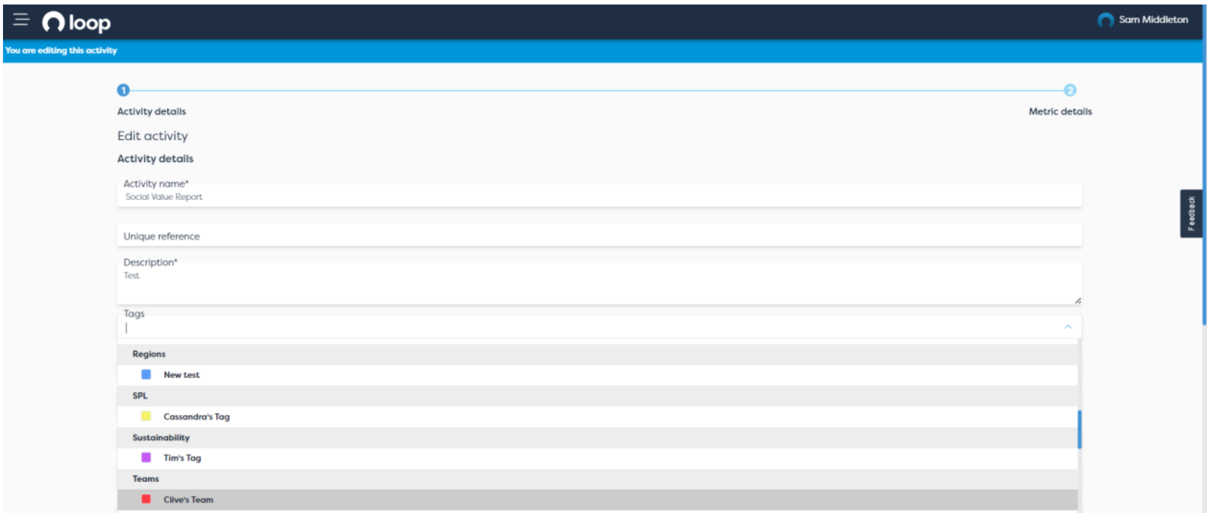


Then select 'Add new tag' and enter the chosen keyword, then click the green tick to confirm your choices.

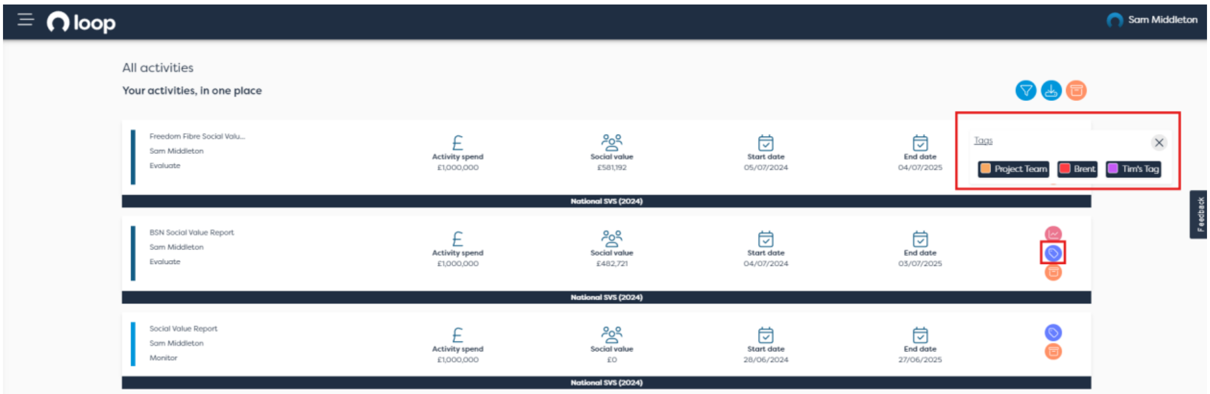


17.2 How to add a Tag to an Activity

To add a tag to an activity, either when creating a new or activity or editing one that has already been created, selected the 'Tags' option in the 'Activity details' section, and then chose the relevant tag as shown below.

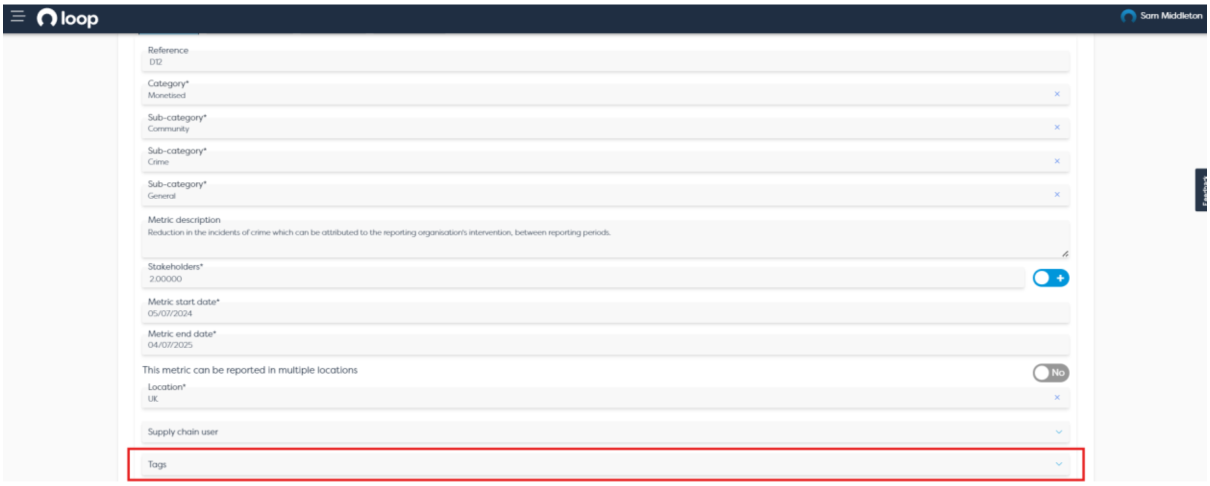


You can then search for this activity using the filter option on the 'All activities' section, as well as view the tags on selected activities by choosing the tag icon in purple, shown below.

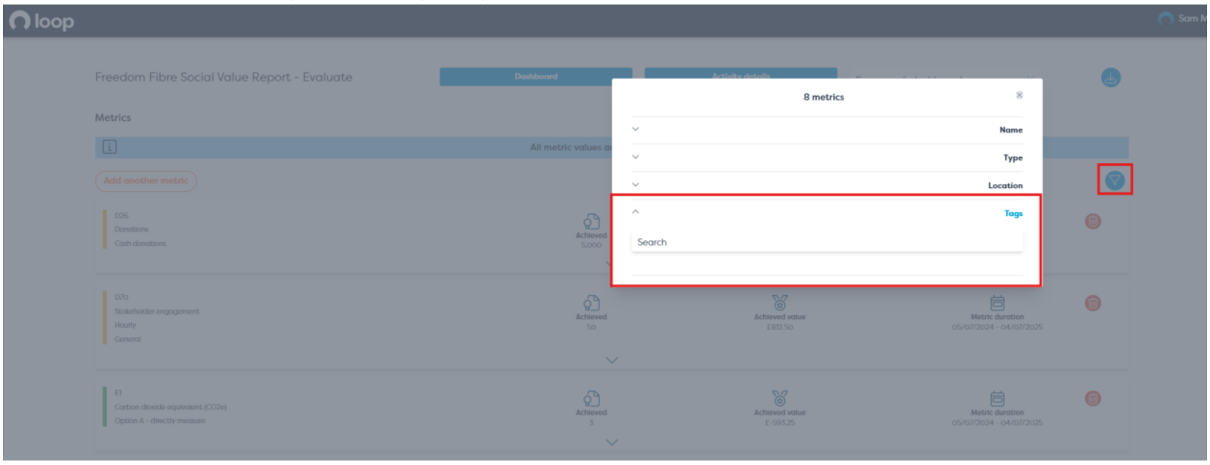


17.3 How to add a Tag to a Metric

To add a tag to a metric, simply choose the desired metric, scroll down to the 'Tags' section and choose from the list of preset tags.



You can then search for these tagged metrics using the filter option on the 'Metric details' page, as highlighted below.



18. Supply Chain Users

This feature allows you to invite members of your supply chain to collaborate with you on your projects, input data as well as view and update their own commitments.

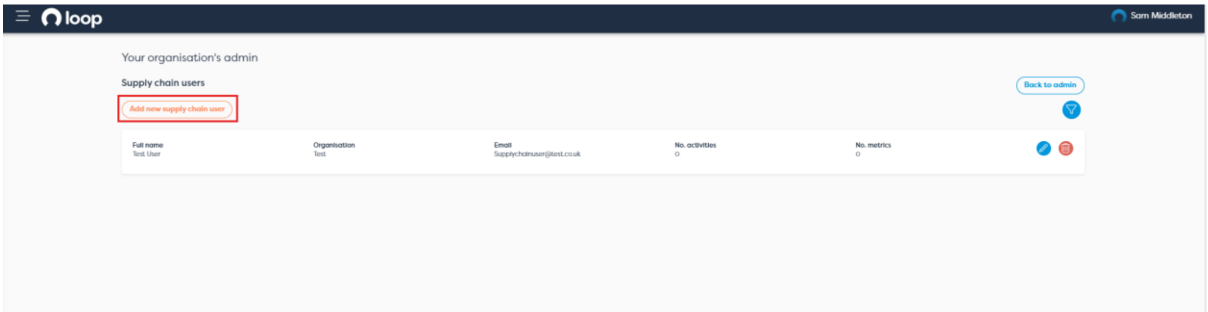
You can choose whether to allocate these users on an activity, allowing them to create their own metrics, or to a specific metric you would like them to enter data into.

They will only be able to view their own metrics or ones they are assigned to, meaning multiple users can collaborate on one project without risk of exposing private or sensitive data.

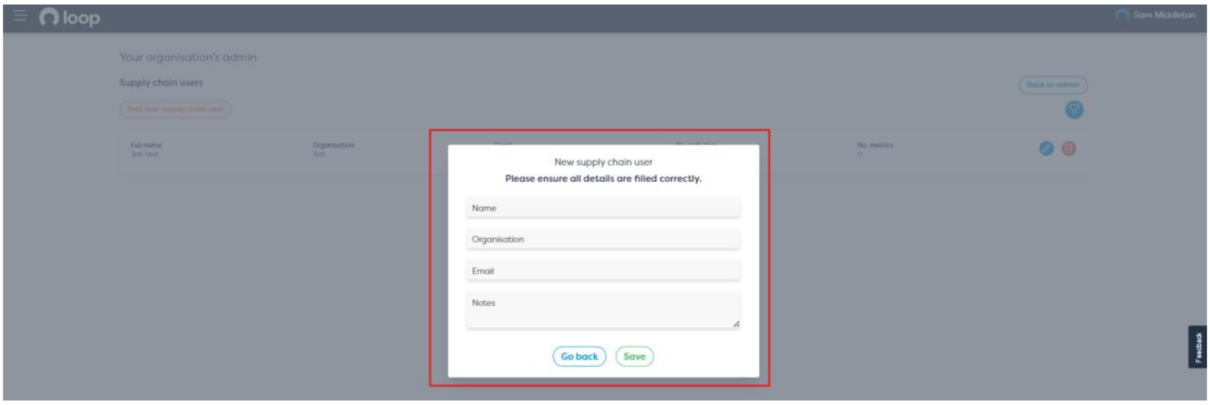
18.1 Adding a Supply chain user

There are multiple ways to add a supply chain user, the first is in the admin section, labelled ‘Supply chain users’ as shown below.

Then select the ‘Add new user’ button.



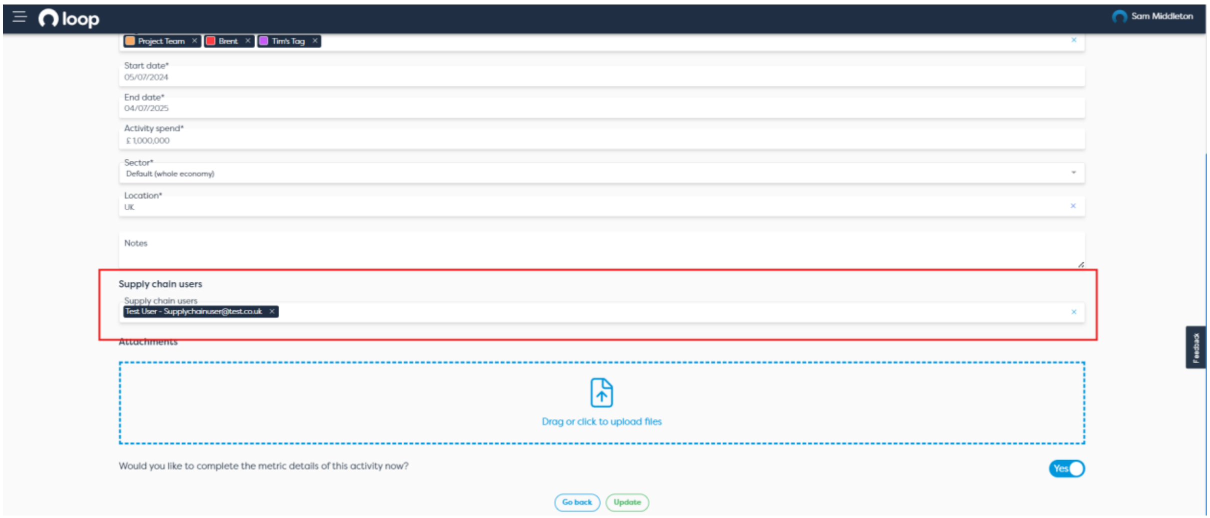
Input the relevant details for the user you are creating, once you click save this well send an email asking the user to set up a password for the account.



The user will be added to your database of preset supply chain users available to add onto any activity or metric when needed.

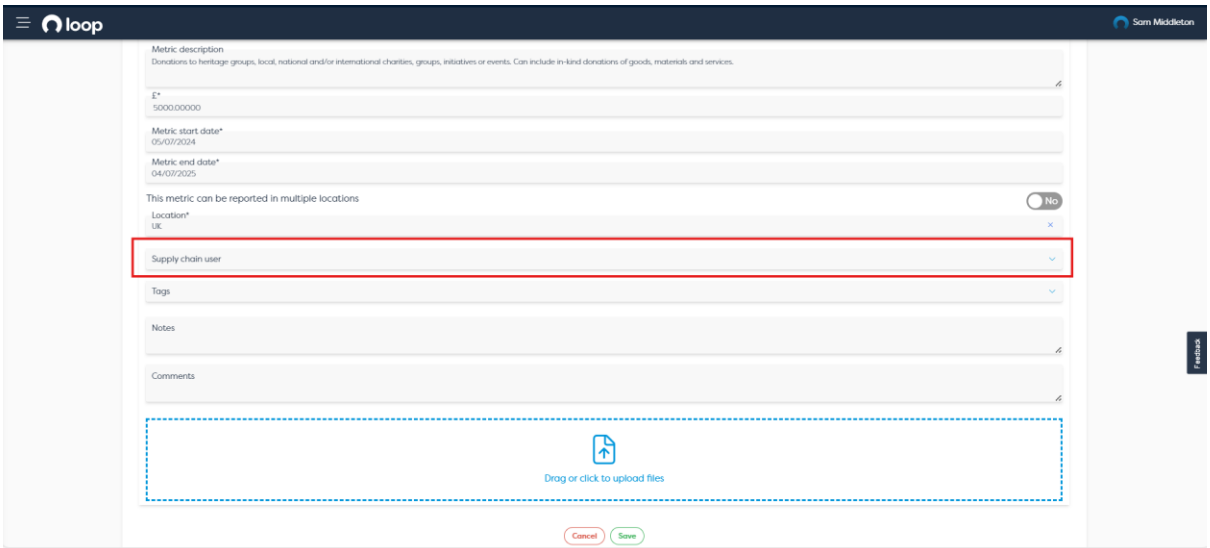
18.2 Adding a Supply chain user to an Activity

To add a Supply chain user to an Activity simply edit the chosen 'Activity details' section, select 'Supply chain users' and add in an existing user or create a new user from this section.



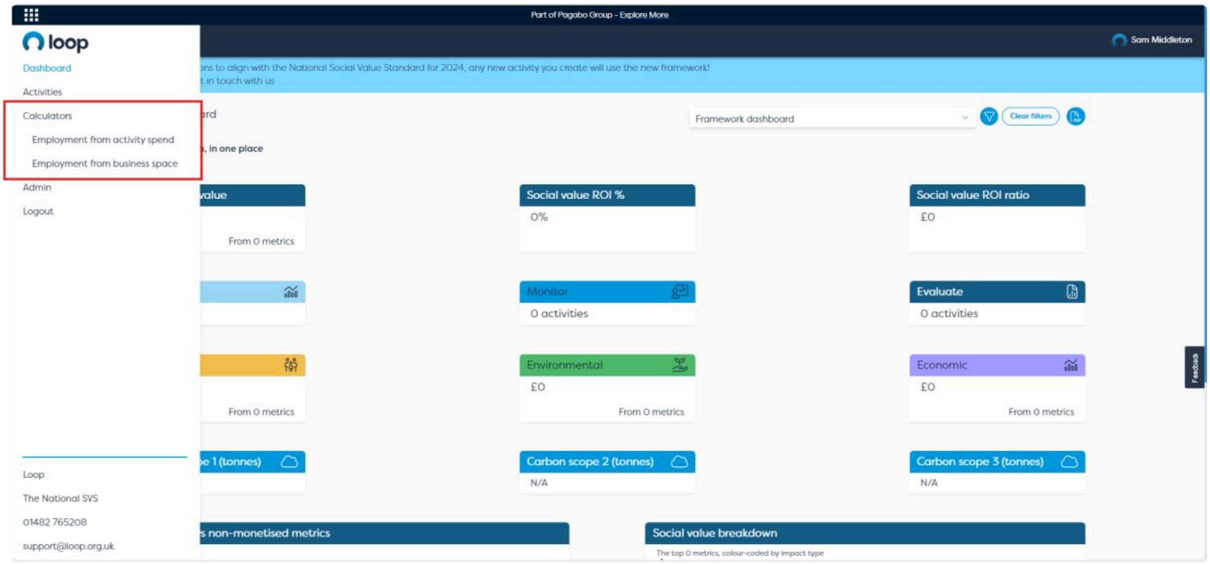
18.3 Adding a Supply chain user to a Metric

Finally, the user can also be added to and individual metric, this will allow them to edit and input data on this metric alone.



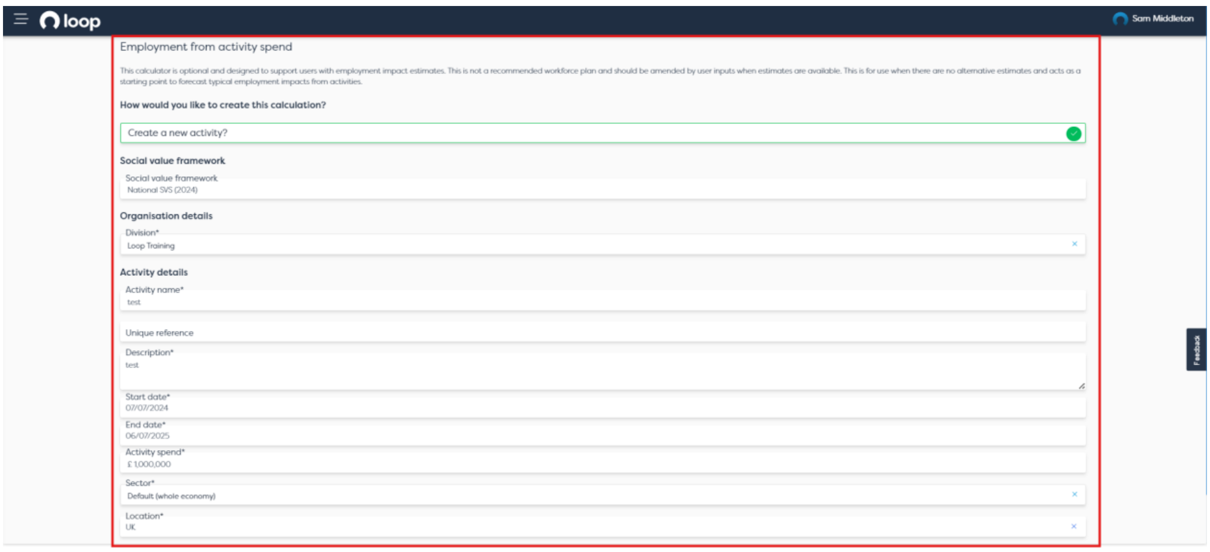
19. Calculators

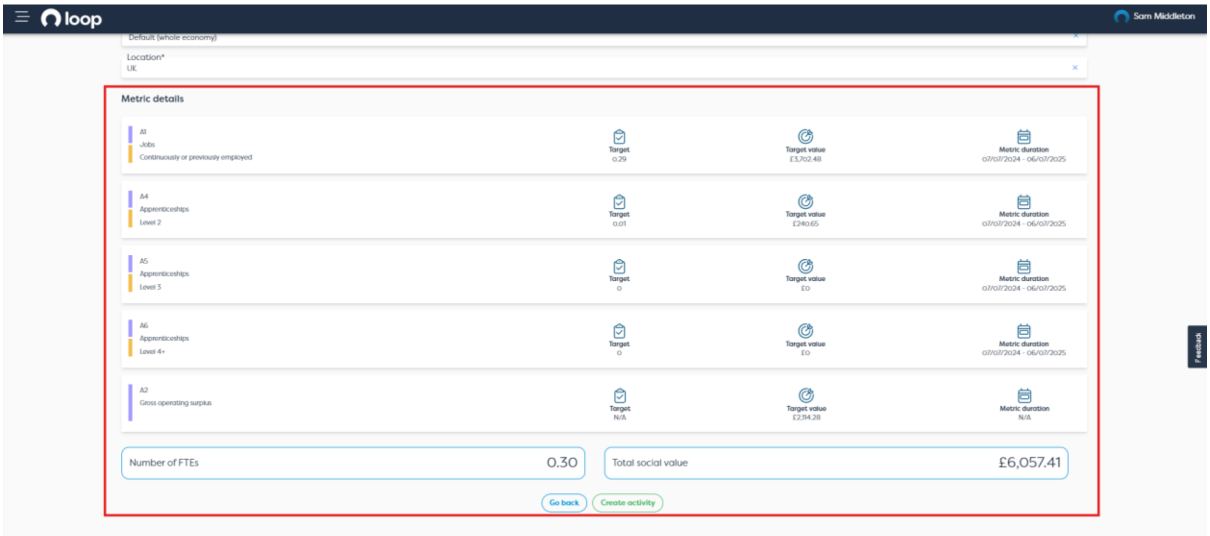
These are two optional employment impact estimate calculators, they are for us when there are no other alternative estimates and acts as a starting point to forecast typical employment impacts from activities.



19.1 Activity Spend

This calculator is optional and designed to support users with employment impact estimates. This is not a recommended workforce plan and should be amended by user inputs when estimates are available. This is for use when there are no alternative estimates and acts as a starting point to forecast typical employment impacts from activities.

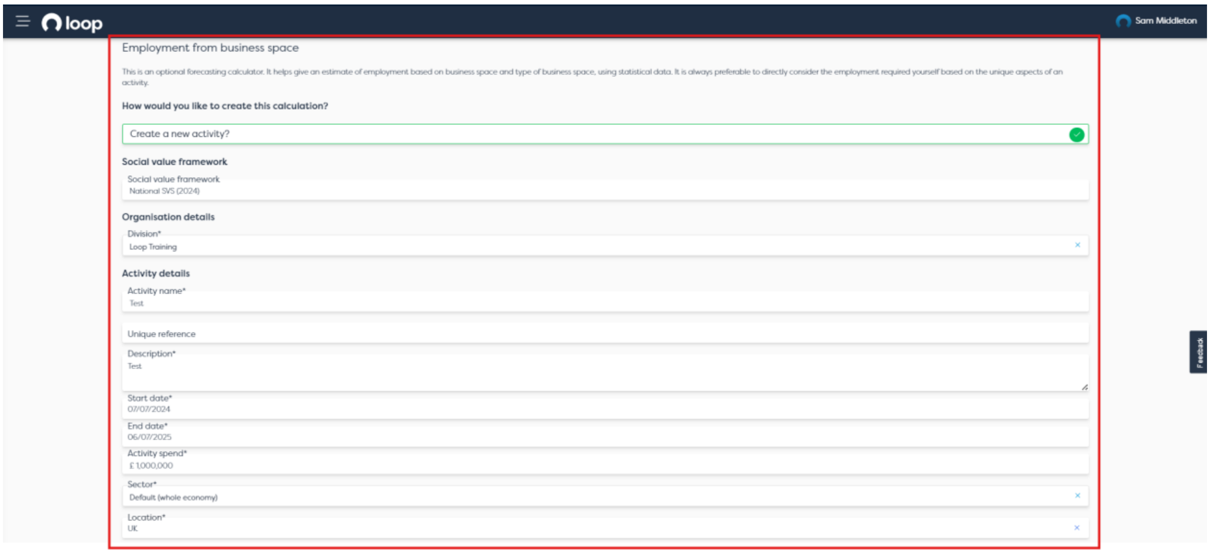


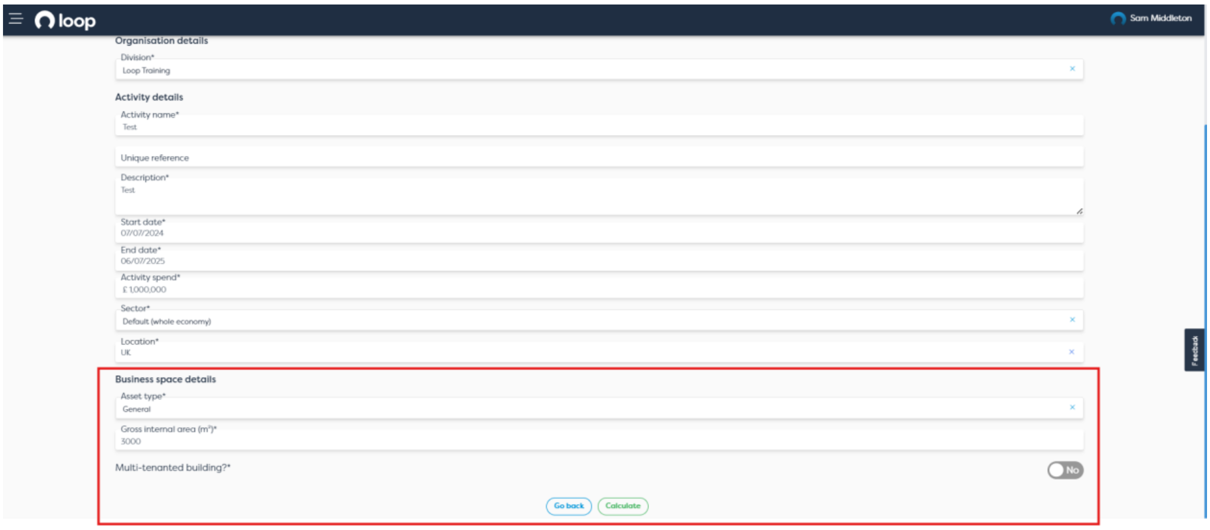


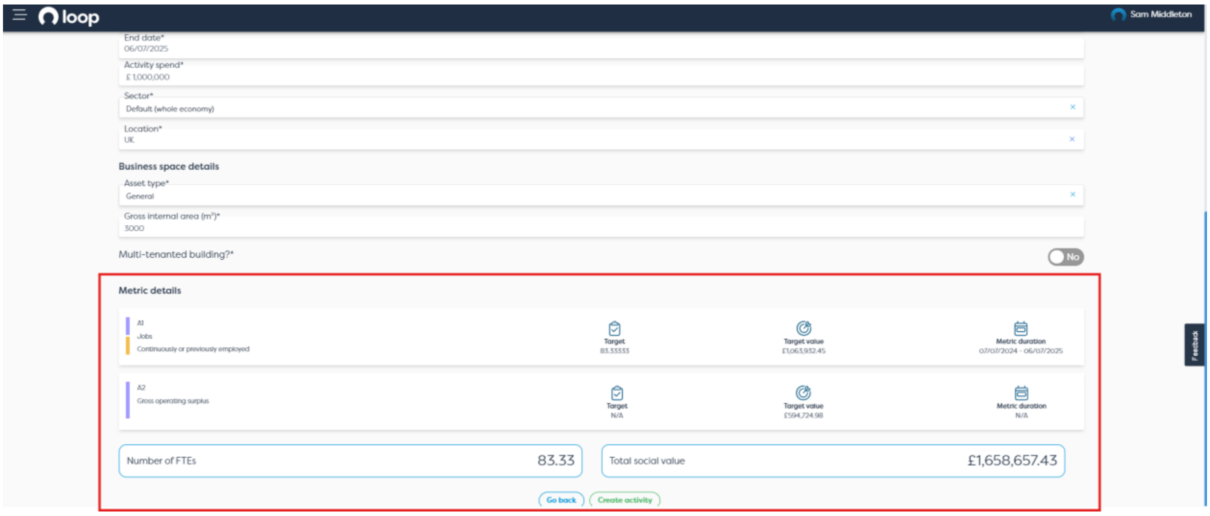
This can then be linked with an existing activity or can be used to create a new activity.

19.2 Business Space

This is an optional forecasting calculator. It helps give an estimate of employment based on business space and type of business space, using statistical data. It is always preferable to directly consider the employment required yourself based on the unique aspects of an activity.







This can then be linked with an existing activity or can be used to create a new activity.