



WDi

Workforce Disclosure Initiative



2021 Scoring Methodology

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WDI Survey Methodology

The reporting process and scoring

Companies must submit their answers online through the WDI online reporting platform. Any companies not already in receipt of a web link to access the platform should contact the WDI team to request one: wdi@shareaction.org. An Excel version of the survey can be used to draft answers; please contact the team who can send you it. Please note that inside the online reporting platform, company users can mark answers as “Not started/In progress/Flagged” etc; these settings are for the company users to help mark progress through the response and so they can communicate with colleagues about which questions are finished or which are not going to be answered for this year etc. They don’t have a bearing on the Disclosure Score of the response and they won’t be communicated to the investor signatories.

Companies have until Friday 29 October 2021 to submit their response via the online reporting platform.

The WDI team is available throughout the reporting period to support companies individually or via group webinars. Companies are encouraged to contact the team as early as possible over the reporting period. We recognise that companies are at different stages of workforce data collection and reporting and that establishing new data collection systems takes time. We invite all companies to be open about gaps in their current data, and the challenges in collecting and reporting the requested information. We also encourage companies to provide feedback on the reporting process which is crucial to helping develop a more robust survey for future years. There is a [glossary](#) at the end of this document to provide clarification on words and phrases.

All the information disclosed via the WDI will be made available to the WDI investor signatories. Investors will be able to use this information to inform their direct engagements with companies and to integrate into their financial assessments of companies. The WDI will also make available to investors the reasons companies give for not taking part in the Initiative.

After the disclosing period ends, companies will receive a **Disclosure Score** and a **Disclosure Scorecard** – only viewable to your company, the WDI signatories and WDI partners – which evaluate a response based on the level of completeness and provide a basic benchmark to peer groups of responding companies. A dummy version of the Disclosure Scorecard can be viewed [here](#).

The WDI team will facilitate dialogue between investors and companies on the responses submitted and topics covered in the survey and we encourage all companies to come to all the webinars and events we hold; please check this page regularly for upcoming events: <https://shareaction.org/wdi/company-resources/webinars/>.

In early 2022, the WDI team will publish a public report on the results of the responses in 2021, with an emphasis on the progress being made in workforce reporting and transparency, sharing examples of good practice from disclosing companies and providing guidance on ways to further improve workforce reporting. This report will contain a list of all responding companies and you can see the 2020 version here: <https://shareaction.org/workforce-disclosure-initiative/why-disclose-to-the-wdi/workforce-disclosure-initiative-2020-findings/>

Scoring methodology

As mentioned above, each company's response is given a **Disclosure Score** which aims to assess its completeness (i.e., the amount of data the company provided). It is not an evaluation of the quality of the company's answers or its workforce policies and practices. The scoring rule applied to each question is shown in the detailed guidance below; there are ten possible rules:

Rule 1	free text box <i>or</i> simple drop-down menu
Rule 2	answer to a yes/no follow up question
Rule 3	yes/no parent question where the 'yes' selection scores 1 point, and the answer to both the 'yes' and 'no' follow up questions score 1 point
Rule 4	table where 1 point is awarded for every editable cell
Rule 5	table where only the first cell is scored
Rule 6	table where column 2 of the top 2 rows is scored (except for Q11.4 where column 2 of the top 5 rows are scored)
Rule 7	table where points are awarded for data in either column 2 or 3, up to a maximum number of points with each row capped at 1 point
Rule 8	table where points are awarded for data in either column 2, 3 or 4, up to a maximum number of points with each row capped at 1 point
Rule 9	table where points are awarded for data in column 2 and then in either column 3, 4 or 5, up to a maximum number of points where each row is capped at 1 point from column 3 onwards

Workforce Transparency Awards

In 2020, the WDI introduced the “Workforce Transparency Awards” which recognise the companies for the level of information they submit. Companies that win awards for their 2021 responses will be recognised at the WDI Awards Ceremony in Q1 2022 and will be profiled on the WDI website and in communications. Companies that win awards (not special mentions) will also receive a physical award to demonstrate their leadership in workforce transparency.

Award categories, and the criteria for each award, are as follows:

Award	Criteria
The WDI Award	The company/ies with the most complete response
Best First-time Responder	The company/ies taking part for the first time who completed the highest proportion of the survey
Most Improved	The company/ies with the largest increase in the completeness of its/their response
Contingent Workforce Data	The company/ies with the most data for workers on non-permanent contracts (i.e., most complete response across questions 3.3, 3.4, 3.5, 3.6, 3.8, 5.9, 6.2, 7.6, 8.5, 8.6, 9.5)
Supply Chain Data (special mention)	The company/ies with the most data covering their supply chain (i.e., most complete response across Sections 11-13)

Most Transparent (special mention)	The companies that opt to make their response 100% public
Workforce Action (special mention)	The companies that answered the highest number of questions looking at how companies are implementing workforce practices (questions 2.8, 2.9, 2.13, 4.1, 4.6, 5.4, 5.9, 8.14, 9.6a/9.6b, 9.9, 10.5, 13.1, 13.2, 13.5)

General Information

Contacts

Charlotte Lush, Research Manager – WDI, ShareAction, charlotte.lush@shareaction.org

Rosie Mackenzie, Senior Company Engagement Manager – WDI, ShareAction,
rosie.mackenzie@shareaction.org

+44 (0)20 3137 5878

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Disclaimer

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