ESG Risk Intelligence Platform

GETSOCIALACCORD

User Guide

About the Platform

The ESG Risk Intelligence Platform (getsocialaccord.com) quantifies the social risk associated with mining, energy and infrastructure projects, namely the risk that conflict with local communities will delay, disrupt or halt an operation.

An assessment consists of a structured questionnaire on the project, which addresses community engagement, grievance mechanisms, resettlement, legal history and regulatory obligations, among other areas, and takes approximately 10 minutes to complete. On submission, the platform produces a Social Risk Score between 0 and 100, in which a lower score indicates lower risk, together with an individual score for each of the 17 risk dimensions assessed. This allows the user to identify where the project's exposure is concentrated.

Where the project's financial figures are provided, the platform also estimates the potential cost of that risk, including the probability of disruption, the legal exposure and the effect on project value. Each assessment concludes with a prioritised action plan. Subscribers may record progress against each action, re-assess the project as conditions change, and export the results as a PDF report suitable for boards, lenders and investors.

The scoring model is based on the Social Accord Architecture, a field-tested methodology for managing the relationship between projects and the communities in which they operate.

This guide provides an overview of the website and its principal features.

1. Create your account

1. Go to **getsocialaccord.com**, click **Sign in** and then **Create a free account**.
2. Enter your work email and click **Send Magic Link**. You can also click **Continue with Google**, or **Create account with password** if you prefer to set a password.
3. For the magic link, open the email we send you, click the link and then click **Continue** to finish signing in.

On later visits, click **Sign in** and use the same method. If you have forgotten your password, click **Sign in with password**, then **Forgot password?**, and follow the instructions in the email.

2. Run an assessment

An assessment is a questionnaire about one project. It takes about 10 minutes and your first assessment is free.

1. Click **Start assessment**.
2. Complete the four steps: **Project Background**, **Operations**, **Community & Environmental Context** and **Governance**. An asterisk (*) marks the required fields. For an explanation of any question, click the **?** icon beside it.
3. Click **Review** and check your answers.
4. Click **Submit Assessment**. Your score appears immediately.

> **Tip** The form saves your answers as you go, so you can leave the page and continue later. If you

> complete an assessment before creating an account, click **Create Free Account** on the results page to save the results. Each project in your account must have a different name.

3. Read your results

Your **Social Risk Score** is a number from 0 to 100. A **lower** score means lower risk.

Score	0 - 25	26 - 50	51 - 75	76 - 100
Risk level	Low	Moderate	High	Critical

Below the score, the results page lists your top risk drivers, the score for each risk area and your first priority actions. Paid plans add the full report, which covers financial impact, legal exposure, the cost of inaction and the complete action plan.

To return to your results later, use the button in the top bar. It reads **My assessment**, **My assessments** or **Dashboard**, depending on your plan.

4. Download a PDF report

Included in all paid plans.

1. Open the project. On Explorer, open it from **My assessments**. On Portfolio and above, go to **Dashboard**, open the project and click **Report**.
2. Click **Download PDF** at the top of the report, or **Download Complete PDF Report** at the bottom of the results page.

On Portfolio and above, you can also export a project's score history as a spreadsheet: open its **Evolution** page and click **Export CSV**.

5. Track your action plan

Included in Portfolio and above.

1. Go to **Dashboard**, open the project and click **Roadmap**.
2. Set the status of each action to **Not Started**, **In Progress** or **Complete**.
3. For more detail, click the step counter on an action (for example, "0/4 steps") and mark each step as you complete it.
4. Open the **Evolution** page to see how your score changes over time.

6. Update an assessment

You can update a project in two ways, and the right one depends on the reason for the change.

Re-assess when conditions on the project have changed. A re-assessment records a new score and adds it to your score history. Included in all paid plans.

1. On Portfolio and above, go to **Dashboard**, open the project and click **Re-Assess Project**. On Explorer, open the project's results and click **Re-assess this project**.
2. The form opens with your current answers. Use the step tabs at the top to reach the answers you need to change.
3. Click **Submit Re-Assessment**. The platform updates your score and action plan, and keeps your progress on actions you had already started.

Edit when you need to correct an answer you entered by mistake. An edit updates the current score without adding a new entry to your score history. Included in Portfolio and above.

1. Go to **Dashboard**, open the project and click **Edit Assessment**.
2. Correct the answers. You can also change the project name here.
3. Click **Save & Recalculate**.

7. Archive or restore a project

Archiving takes a project off your active list and frees a place on your plan; it deletes nothing. Available on paid plans.

1. Go to **Dashboard** (on Explorer, **My assessments**).
2. Click **Archive** on the project.
3. To restore it, find the project among your archived projects and click **Restore**. Restoring requires a free place on your plan.

8. Add team members

Included in Portfolio (5 seats) and Enterprise (15 seats). A seat is one user, and your own account counts as one. For each person, you choose which projects they can see or edit.

1. Click your profile picture in the top-right corner, then **Team**.
2. Under **Your team**, enter your colleague's email address.
3. For each project, tick the access they should have: **View**, **Edit Roadmap** or **Edit Reassessment** (which lets them edit and re-assess the project).
4. Click **Invite**. Your colleague receives an email and appears as pending until they accept.

> **Tip** When several people need the same access, create a role first under **Roles** (for example, "Reviewer"), set its permissions once and select that role each time you send an invitation.

To remove a member, click **Remove** beside their name. To withdraw an invitation that has not been accepted, click **Cancel invite**.

Extra seats on Enterprise. If you need more than 15 seats, open the **Team** page and enter the number you need under **Extra seats**. Click **Review change**, then **Pay and add seats**. Each extra seat costs $25 per month, and a team can have up to 50 seats in total.

9. Join a team you were invited to

How you accept depends on whether you already have an account.

- **If you have an account:** sign in, click your profile picture, then **Team**, and click **Accept** under **Your invitations**.
- **If you do not have an account:** click the link in the invitation email and create your account with the email address that received the invitation. You join the team automatically.

The projects shared with you then appear on your **Dashboard**. Invitation links are valid for 7 days. If yours has expired, ask the person who invited you to send it again.

10. Upgrade or change your plan

Plan	Free	Explorer	Portfolio	Enterprise
Projects	1	1	10	25

Plan	Free	Explorer	Portfolio	Enterprise
Seats (users)	1	1	5	15+
Full report and PDF	–	✓	✓	✓
Re-assess a project	–	✓	✓	✓
Dashboard and roadmap tracking	–	–	✓	✓
Team members	–	–	✓	✓

1. Click **Upgrade** in the top bar, or open **Pricing**.
2. Choose **Monthly** or **Annual** billing. Annual billing is available on Explorer and Portfolio, and costs the same as 10 months.
3. Click **Upgrade** on the plan you want and complete the payment. If you already have a paid plan, the platform asks you to confirm the change first.
4. You return to your **Account** page. The new plan is usually active within a few seconds.

Moving to a smaller plan. If you have more active projects than the smaller plan includes, archive the additional projects first (see section 7). Team members beyond the smaller plan's seat limit lose access until a seat becomes free or you upgrade again.

The **Group** plan, for larger organisations, is quoted individually. To ask for a quote, click **Request a quote** on the Pricing page.

11. Cancel or request a refund

Cancelling your plan. You cancel from the billing page:

1. Click your profile picture, then **Account**.
2. Under **Subscription**, click **Manage billing**. The billing page opens.
3. Cancel your plan there and confirm.

Your plan stays active until the end of the period you have paid for, and there is no cancellation fee. After that, your account returns to the Free plan and we keep your project data for 12 months. If you change your mind before the period ends, click **Keep my plan** on your **Account** page.

Requesting a refund. A 30-day money-back guarantee covers your first paid subscription. To request a refund, email **info@thomasgaultier.com** within 30 days of your first payment, from the email address on your account, and we refund the most recent month's payment in full. The Terms of Service set out the full conditions.

The billing page is also where you update your payment card and download your invoices.

12. Manage your account

Click your profile picture, then **Account**. On this page you can do the following.

- Update your name, organisation and profile photo.
- Change your email address. We send a confirmation link to the new address, and the change takes effect when you open it.
- Change your password, or set one if you signed up with a magic link or Google. Changing your password signs you out on your other devices.
- On Portfolio and above, replay the introductory tour of the dashboard with **Show me around again**.

13. Help and contact

- **Sample Report**, in the top bar, shows a complete example report.
- **Demo**, in the top bar, lets you try the dashboard with sample data. It requires a free account.
- For questions, email **info@thomasgaultier.com**. To speak with us, use the **Book a demo call** link on the Pricing page.