

# *HELMA 2024* framework guide

National Highways

April 2024 version 1

# Background

The Lean division was established in April 2009 with initial focus on the adoption of Lean practices in the supply chain.

Supplier organisations were encouraged to develop their own Lean programmes and run Lean improvement projects with progress being assessed by the Highways Agency Maturity Assessment Tool (HALMAT) which was based on a range of existing industry models.

The transition of the Agency into Highways England along with the associated 5-year investment cycle coincided with a refresh of the model into the Highways England Lean Maturity Assessment (HELMA)

HELMA consists of 4 themes with 10 topics. The 10 topics each have 5 defined levels of maturity (rated 0-4) that are used to establish levels of Lean maturity. On an annual basis, key supply chain organisations undertake a self-assessment against the 10 topics which is then 'moderated' by a member of the National Highways Lean Team alongside an independent, external assessor.

It is clear that the use of HELMA and predecessor HALMAT has had and continues to have a pivotal role in the increased adoption of Lean across the Highways sector and National Highways supply chain.

# Key links

[HELMA 2024 Framework](#)

[HELMA Scoring Chart](#)

[MIRO template for evidence capture](#)

## Revised topics

1. Integration of Lean and Business Strategy
2. Lean Leadership and Engagement
3. Deployment Management and Lean Infrastructure
4. Voice of the Customer
5. Value Streams and Processes
6. Methodologies and Tools
7. Competences and Capabilities across the Organisation
8. Performance Improvement and Delivery of Outcomes
9. Continuous Improvement Culture
10. Supplier Engagement



There will be 'themes' that cut across the topics and need to be reflected more broadly:

- Intrinsic vs Extrinsic engagement
- Tangible Outcomes

# Q&A

## 1. Have the topic areas changed?

No, there are still 10 topic areas covering the same aspects of Lean. The titles have been updated to reflect the content more clearly (see slide 4)

## 2. Does the moderation still take 1 day to complete

Yes, the moderation is still a full 1-day session. It is recommended that the moderation takes place at the most suitable location, preferably face to face so that the moderation team can meet as many of the team as possible.

## 3. Is the new framework score aligned to the previous framework scoring?

No, the scores are not to be compared to the old framework as the maturity statements have been refreshed to reflect Lean in 2024. As a result of this it is expected that there will be an overall reduction in your score from the previous framework.

## 4. Will all 10 topic areas be moderated at the assessment?

All 10 topic areas will be moderated on the day, as this will create a new baseline for all suppliers under the new framework. This will be reviewed in the future once baseline scores have been established for all suppliers.

## 5. Will the HELMA name be changing to reflect the new framework

Yes – The new title is *HELMA 2024*.

## 6. How will evidence be presented?

Following extensive feedback and engagement with supply chain partners, a new standardised approach has been developed to how evidence will be captured.

As a result of the engagement, NH will provide a template (to be released soon) for you to gather and present your evidence in one space. Although this is not mandated, it is highly recommended to create consistency.

This new approach also provides an area for your improvement actions to be captured during the moderation.

# Q&A

## 7. What happens if I do not submit my Improvement Action Plan in the allowed timeframe?

If your Improvement Action Plan is not submitted within 3 months, then a score of 0 will be given until your next moderation. The template IAP can be used, and actions captured during the moderation. This can be exported to Excel to submit within the 3 months, once the IAP has been formally agreed within your business.

## 8. Is the scoring methodology changing?

- The scoring will still be between 0-4 as shown below. When every aspect of a maturity statement is sufficiently evidenced then this awards the full score of 1.0 for that maturity level.
- Where all aspects, or bullet points, of a maturity statement cannot be fully evidenced, then only those bullet points that are sufficiently evidence count towards that maturity level. This is worked on an equal pro rata basis. Therefore, **the full score of 1.0 is divided by the number of bullet points for that maturity statement**. For example, if there are 5 bullet points that make up that maturity statement then each bullet point is worth 0.2. Equally if there are only 3 bullet points making up that maturity statement then each bullet point is worth 0.33.

Score	Maturity Definition
0	Not started
1	Started some progress in some areas
2	Developing and delivering good practice in some areas
3	Good practice performance improvement evident in many areas
4	Excellent organisation wide achievement embedded

## 9. Does the HELMA apply to the whole organisation?

Yes, we encourage evidence to be gathered from other parts of the business (not just those facing NH). This helps to demonstrate embedment in the wider organisation and shows an intrinsic motivation for Lean, rather than only responding to the client's requirement for it. A demonstration of Lean in the wider business shows that leadership fully support Lean and believe that the benefits it provides are applicable to other parts of the organisation.

When evidence is restricted to only the part of the organisation that interfaces with NH, with no evidence beyond this, then this can indicate that Lean is an extrinsic motivating factor based on NH requirements only. The application of Lean in 'non-operational' area such as Finance & HR is relevant especially to organisations that are only Highways focussed. Whilst examples of Lean application in other business units and support functions are important, the assessment will be focussed on the particular Highways focussed entity.

# Assessment & Moderation Approach

