

Scorecard for Measuring Success

Introduction

Periodically revisiting goals and determining what **level of progress** has been achieved offers an opportunity to make appropriate adjustments in strategy or approach. Success can be measured in many ways, including measurable cost savings, direct and positive feedback from the stakeholder community, additional funding or a growing level of executive support. Developing a set of **quantitative performance benchmarks with completion dates** for each goal or sub-task provides a way of establishing a clearly understood scorecard that can be used to measure progress. Assessing progress against these “targets” obviously provides a means to determine the current success level. If that level is low then appropriate corrective actions need to be taken.

This document provides a flexible method for creating a **scorecard** that objectively measures progress. Participants in the planning process will be responsible for articulating both the programmatic goals for their organization, and the **checklist** of tasks that need to be done to make progress toward meeting their goals.

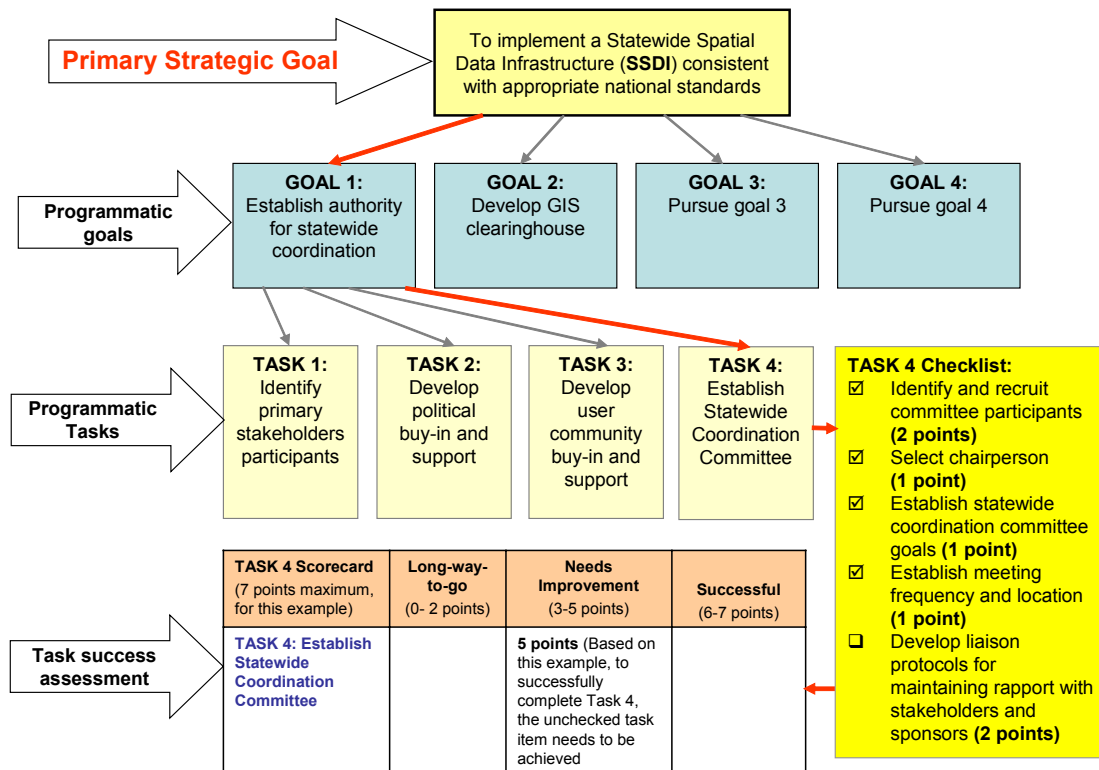
Basic Steps to Develop an SSDI Scorecard

- Make a goal and task breakdown chart. This will help to visualize the relationship of strategic and programmatic goals, as well as the tasks required to implement each goal.
- For each task, make a checklist of the things that need to be done to achieve successful completion. The number of items can be as long as needed, but 5-10 key items are often enough. Based on the number of items completed, progress can be mapped to a measurement continuum (see below). Depending on the relative importance of each item on the checklist, some items might “count” more than others. If preferred, or suitable for the situation, a mandatory pass/fail approach can be used. Examples are given for both cases – rating progress with points, or rating on a pass/fail system (see examples, below).
- Select a measurement continuum to rate progress on each task. This can be a simple scale of 3 to 5 qualifiers selected to characterize increments of success, such as low/medium/high, poor/fair/good/very good, or long-way-to-go/needs-improvement/successful. Once a range of qualifiers is selected, numerical ratings can be assigned to each, or, if more appropriate, a pass/fail approach can be used. A cumulative score for multiple tasks can also be tabulated, if a point system is used. Hybrid approaches could be developed based on the particular situation (i.e., both points and pass/fail).

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- Based on the number of items completed for each task checklist, progress can be now be mapped onto the measurement continuum. For the point system, 0-1 items completed might appropriately be low success, 2-3 might be medium, and 4-5 might be high. If weights are used, a more important item may count as two less important items, and the potential total score as well as the increments for each level of success need to be adjusted, accordingly (see example using points, below). For the pass/fail system, progress is plotted on the success continuum. Based on the completion of mandatory tasks on the checklist, progress is monitored.

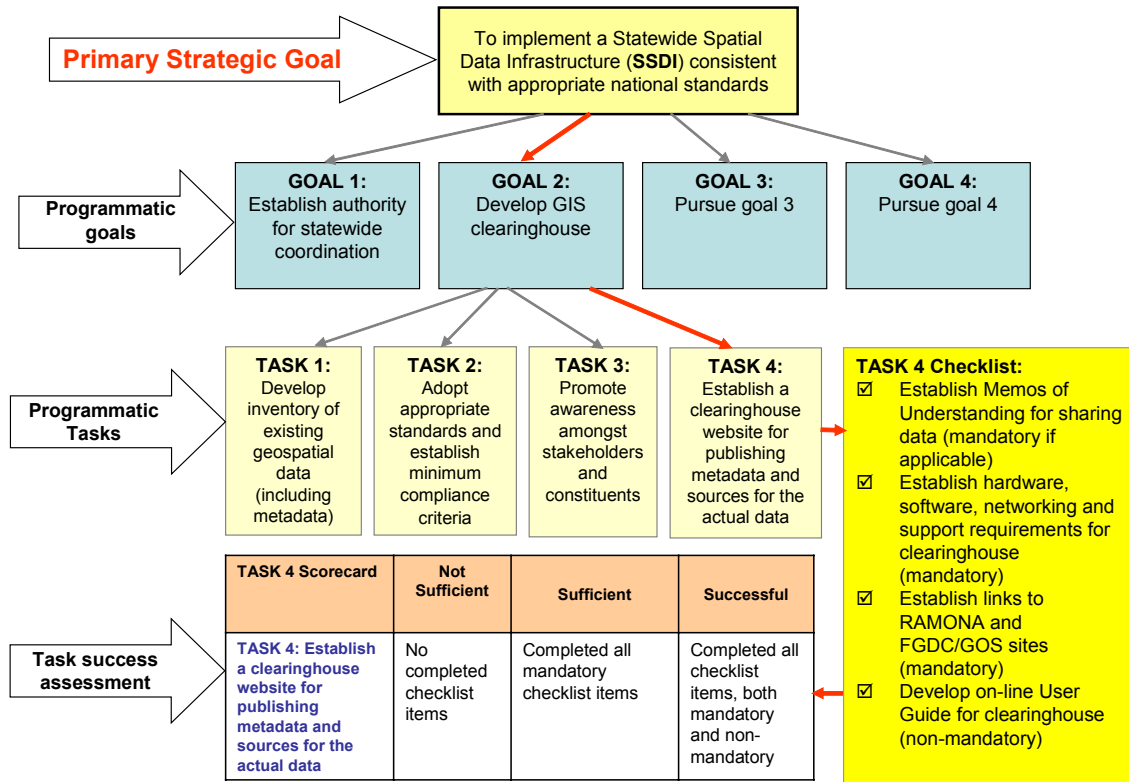
Example 1 - Using Points to Rate Progress



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Example 2 - Using Mandatory Pass/Fail to Rate Progress



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Performance monitoring should occur on a periodic basis throughout the project. Progress may be incremental.