

Project Scorecard Introduction

Objectives:

- Identify a possible local energy project for each strategy being considered.
- Develop a short list of potential future projects.

Roles and Supplies Needed:

- *Strategies Checklist* (all four sections)
- Copies of the *Scorecard* (you'll be creating at least one scorecard for each of the strategies you marked in an orange Status Report column on the Strategies Checklist)

Suggested Duration: 30 to 60 minutes, depending on how many projects are being scored.

Instructions: *Read through all the steps before you begin.*

Look back at your Strategies Checklist – you will only be completing scorecards for **major strategies** (listed in bold print on your Checklist) not sub-steps. AND, only those major strategies you marked as one of the following:

- “More To Do”
- “Challenge”
- “Wish List”

Pay attention to major strategies on the Checklist that have sub-steps. Your status report on these sub-steps will influence what kinds of projects your group is ready to take on within each major strategy.

Step 1: Make a list of all the strategies from the Checklist that meet the criteria above (major strategies listed as “More To Do”, “Challenge”, or “Wish List”).

Step 2: Write each strategy (and the Impact Goal it belongs to) at the top of its own scorecard. Leave the “Project” box blank.

Step 3: In the “Project” box at the top of each scorecard, describe a specific project your energy committee could take on related to that strategy (e.g. use existing audit to implement energy improvements at the fire station). Projects may be highly specific or more general, depending on the situation. Have more than one project in mind? It's OK to do more than one scorecard for a particular strategy if you have more than one related project you'd like to consider.

Step 3: Look over the criteria listed on the Scorecard template. Is there anything missing? Add your own criteria at the bottom of each scorecard, but make sure to use the same criteria on all of your scorecards.

Step 4: Complete each of the scorecards, adding up the “score” at the bottom of each sheet.

Step 5: After calculating each score, consider the question at the bottom of each scorecard: How excited is our group to work on this project? Circle “Not very”, “Somewhat”, or “Extremely”. Even the highest scoring project will go nowhere if no one in your group is excited about it.

Step 6: Enter the results from your scorecards into the “SCORE” column of your Strategies Checklist. If you had multiple projects for a single strategy, enter the highest score among the projects you considered.

Tips:

- Consider splitting up the work among a few small groups rather than trying to complete each scorecard altogether.
- If you split into smaller groups to complete the scorecards, mix up the groups partway through the process (send a few people from each group to swap groups) to help make sure you are scoring all the projects evenly.
- Don’t let yourselves get stuck – just keep moving through. It’s OK if you don’t have perfect consensus as you’re filling out the scorecards.

Suggestions for Adapting the Scorecard Exercise:

- Even if you don’t use the scorecard as a scorecard, you can use it as a discussion guide. The criteria listed are a great outline for any conversation about the impact of a particular project or a strategy for prioritizing your efforts.
- Like the idea of scoring projects but don’t like our scorecard? Feel free to create your own. Or change a particular criterion you think is unclear or not useful. But once you’ve settled on your criteria, you’ve got to stick to it. It’s important to score all of your options based on a consistent scorecard.
- You may decide some criteria are more important to you than others. Pay attention to that as you compare your potential projects. Some groups might even devise a way to “weight” certain criteria over others when calculating each project’s score.
- If you can’t think of a specific project, go ahead and just score the strategy itself and see what happens.

- If you think it would be helpful to score a strategy listed as a sub-step in the Checklist, feel free to do so.
- The Scorecard can be a way to have an objective conversation about projects
- Use the scorecard anytime to make sure the projects you are working on have the kind of impact you are looking for. Even doing a scorecard for just one project could help you look at the project in a different light.
- Send the Scorecard home as pre-meeting work for members of your group and compare your scores on various projects at your next meeting.