Annex 1

Sample Agenda for a 4-Day Community Scorecard Training and Pilot

DAY 1 (MAY 28) **Introduction to Community Scorecards (CSCs)**	DAY 2 (MAY 29) **Preparing to Pilot the CSC**	DAY 3 (MAY 30) **Facilitating CSC Assessment Meetings**	DAY 4 (MAY 31) **Facilitating the CSC Interface Meeting & Wrap-Up**
1.1 Welcome, Introductions, Ice-Breaker & Overview of the Training Course	2.1 Energizer + Tips on Being an Effective Facilitator (Interactive Exercise)	3.1 Energizer + Selected Trainees Co-facilitate Self-Assessment Meeting (with company representatives)*	4.1 Energizer + Selected Trainees Facilitate the Interface Meeting*
COFFEE BREAK			
1.2 Presentation & Discussion about the Program, Service or Activity that will be Assessed	2.2 Preparations for the Upcoming CSC Pilot & Simulation of a CSC Assessment Meeting	3.2 Debrief of Self-Assessment Meeting	4.2 Follow-up Meeting with selected members of the Joint Action Committee + Debrief
LUNCH BREAK			
1.3 Energizer + Demonstration of the CSC Process	2.3 Energizer + Promoting Inclusive and Constructive Dialogue (Interactive exercise)	3.3 Energizer + Selected Trainees Co-facilitate Community Assessment Meeting(s)*	4.3 Energizer + Anticipated Challenges & Proposed Solutions in Implementing the CSC (Interactive Exercise)
COFFEE BREAK			
1.4 Step-by-step Overview of the Community Scorecard (CSC) Methodology	2.4 Persuading Stakeholders to Participate in the CSC (Role Play)	3.4 Debrief of Community Assessment Meeting(s) & Preparations for the Interface Meeting	4.4 Participatory Assessment of the Training/Pilot, Wrap-up, and Written Evaluation

Note that the participation of (10-15) company representatives is required for the Self-Assessment Meeting on the morning of Day 3 and about half of these for the Interface Meeting on the morning of Day 4. The participation of (15-20) community representatives is required for the Community Assessment Meeting on the afternoon of Day 3, and about half of these for the Interface Meeting.

Annex 2

Suggested methodologies for scoring criteria (through voting) and calculating median scores

Once assessment criteria have been identified, participants are given the opportunity to express their current level of satisfaction with each criterion through a process of scoring/voting. The scoring/voting process should be conducted as simply and quickly as possible. Ideally it should take no more than 5 minutes.

Suggested methodology for scoring criteria

1. As shown below, clearly write the name of each criterion (one per row, numbered 1 through 5) on the left-hand side column of the scorecard (using a horizontal flipchart sheet).

Sample Collective Voting Scorecard

Criteria	Very Good 5	Good 4	OK 3	Poor 2	Very Poor 1
	JJ	J	K	L	LL
Criterion 1					
Criterion 2					
Criterion 3					
Criterion 4					
Criterion 5					

2. Place the scorecard on a wall or any hard surface. Distribute 5 stickers to each participate (i.e. one for each assessment criterion). Explain to participants that they will use these stickers to express their current level of satisfaction with each criterion. They will rate each criterion as "Very Good", "Good", "OK", "Poor" or "Very Poor".

Tips:

- *If the group is very large (i.e. more than 40 people), it may be preferable to place separate scorecards (one for each indicator) at different places around the room and welcome participants to walk around the room to vote for each indicator.*

- *If stickers are not available, small strips of masking tape coloured with a marker can be used as a substitute.*

- *If there is no available wall space, scorecards can be placed on the floor or ground and participants vote with stickers or by placing a pebble or dried bean in the appropriate square.*

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[1] Adapted from: *Malena. 2015. Implementation of the Social Accountability Framework Demand-Side Operational Guidelines. Phnom Penh: I-SAF.*

3. It is important to clarify to participants that they should vote according to their own personal experience and current level of satisfaction with the service/project/program being assessed. It is perfectly normal that scores will differ between individuals because each individual's experience with the service/project will be different.

4. Invite participants to score each criterion, by placing their sticker (pebble or bean) in the space on each row that corresponds to their personal assessment of that criterion.

Tips:

- *Invite all participants to vote simultaneously (rather than lining up). This can look a bit "chaotic" but is typically much quicker (and more confidential) than lining up. Using this method, the actual voting process should take no more than 5-10 minutes.*

- *If there is a concern with "copycat" voting (i.e. people being overly influenced by the vote of others) then, instead of using stickers, the team may opt to tape small opaque plastic cups to each square of the scorecard (5 cups for each criterion) and to invite participants to vote by placing small beans, pebbles or short pieces of plastic straws into the cup of their choice. This system making previous votes less obvious to see. A trade-off is that is that vote counting takes slightly longer with this system.*

- *In mixed groups, if desired, one colour of sticker (bean, pebble or straw) can be distributed to men and a different colour to women (allowing for the subsequent disaggregation of assessment data by gender).*

Suggested methodology for calculating median scores

Once scoring is complete, an assistant facilitator should calculate and circle the median (or mid-point) score for each criterion. In order to avoid a lull in the meeting, this should be done as quickly as possible. The median for each criterion can be quickly calculated by (i) counting the number of people who voted, (ii) dividing that number by two (to find the mid-point), then (iii) counting the votes on the scorecard (starting from either the left or right-hand side of the scorecard, it doesn't matter which) to identify which square (i.e. the "Very Good", "Good", "OK", "Poor" or "Very Poor" square) contains the mid-point vote. In the example above, a total of 11 people voted, which means that the mid-point is 6. Counting from either the left or the right, the 6th vote falls in the category of "Good" (4/5) for Criteria 1 and 4, "OK" (3/5) for Criteria 2 and 3 and "Poor" (2/5) for Criterion 5.

Sample of a completed voting scoresheet with median scores marked (11 voters)

Sample Collective Voting Scorecard

Criteria	Very Good 5	Good 4	OK 3	Poor 2	Very Poor 1
	JJ	J	K	L	LL
Criterion 1	IIIII	(I)	III	II	
Criterion 2	III	I	(IIIII)	I	I
Criterion 3	II	II	(II)	IIIII	
Criterion 4	IIII	(II)	III	I	I
Criterion 5		I	III	(IIII)	III

Sample of a completed gender equity scoresheet with median scores marked (13 voters)

Criteria	Very Good 5 😃	Good 4 🙂	OK 3 😐	Inadequate 2 🙁	V. Inadequate 1 😖
1. Work/life balance & family-friendly arrangements.		•		• • •	• ✓ • • •
2. Equal pay for equal work.	• • • •	• ✓	• • • •		
3. No gender limitations on jobs opportunities	•	• • • ✓ •	• •	• •	• • •
4. Gender-balanced workforce				• • • ✓ • • • •	• • • •
5. Safe work environment for all genders.	•	• • •	• • • ✓	• • • •	•

Annex 3

Proposed methodology for prioritization[2]

At different stages during the Community Scorecard process, the facilitators will lead the group through a process of collective prioritization. In assessment meetings, for example, prioritization is necessary (i) to reduce the list of assessment criteria identified by participants down to 4–6 priorities and (ii) to reduce the list of proposed actions identified by participants down to the top 4–6. In the interface meeting, the same process may be used (iii) to identify 4–6 priority actions from among the consolidated list of actions proposed by different groups.

Prioritization should be conducted as simply, quickly and democratically as possible. Ideally it should take no more than 5–10 minutes. Experience shows that trying to identify priorities through group discussion and a show of hands is not effective and tends to lead to domination by more powerful or outspoken participants. In order to ensure that every voice has equal weight, and to ensure time efficiency, the use of "dot-mocracy" (i.e. using stickers to vote) is recommended.

Proposed methodology

1. Begin by ensuring a clear list of items among which participants are being asked to prioritize before beginning the prioritization process.

Tips

- *In the case of the interface meeting, this will require consolidating the (top 4-6) priority actions from each different group into one single list, taking care to combine any actions that are the same or very similar into one single item in order to avoid duplication. (Do this in a participatory manner, making sure that the whole group understands and agrees with the final consolidated list).*

- *To facilitate the process of consolidating the proposed actions from different groups into one, and to combine similar actions into one, it is recommended (before the meeting) to transcribe the proposed actions from each group onto separate cards that can be easily moved around (with the use of masking tape).*

2. Give each participant three stickers (or strips of masking tape, pebbles, beans or whatever voting material is being used) that they can use to "vote" for the three criteria or actions that they consider to be most important.

Tips

- *Make sure that next to each item, there is room for participants to place their votes. i.e. During assessment meetings, when writing down assessment criteria and proposed actions on the flipchart sheets, the facilitators should take care to leave adequate space at the end of each item and between each item to allow space for voting.*

- *Invite all participants to vote simultaneously (rather than lining up). This can look a bit "chaotic" but is typically much quicker (and more confidential) than lining up.*

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[2] Adapted from: Malena. 2015. *Implementation of the Social Accountability Framework Demand-Side Operational Guidelines. Phnom Penh: I-SAF.*

3. Once everyone has voted (this should take no more than 5–10 minutes), the facilitators quickly count the number of votes for each item and identify the top five priority items, according to those that received the most votes. (i) In the case of **assessment criteria**, the top 4–6 priority criteria are then transcribed onto the voting scorecard. (ii) In the case of **proposed actions**, the top 4–6 priorities are transcribed onto individual cards (for use in the subsequent interface meeting). (iii) In the case of the **consolidated list of proposed priority actions** presented at the interface meetings, the top 4–6 actions that receive the most votes overall are transcribed onto the final Action Plan.

Example of proposed actions for gender equity prioritized at an interface meeting

Users' Guide to Community Scorecards A Toolkit for Companies and their Partners in the Infrastructure and Natural Resources Sectors

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