

A scorecard to assess and improve infrastructure engagement



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Infrastructure Engagement Excellence Standards



Infrastructure Engagement Excellence Standards

Q. Which of these 10 Standards do you think engagement professionals prioritised for scorecard development?



Infrastructure Engagement Excellence Standards



OUTCOME	INDICATORS
<p>Contract management refers to the integration of community engagement into contracts, including but not limited to, contractual recognition of:</p> <ul style="list-style-type: none"> the purpose and aims of the engagement plan adequate human and financial resourcing by the contractor for the engagement process agreed management practices to support consistency and continuity of communication across project stages and through staff turnover engagement-related deliverables, milestones or KPIs a regular process for assessment/evaluation. <p>This formal recognition and prioritisation of community engagement results in a more consistent approach to communities to support high quality engagement, reduce social risks and improve outcomes.</p>	Relationship quality
	Clear obligations
	Consortia buy-in
	Consistency

And the winner is.....



Contract Development & Management!!



Why?

- Can place limits around engagement eg \$
- Can support engagement eg clarity of responsibilities, etc
- Engagement may not have an allocated budget

NOTE: Engagement with: community, stakeholders, project team

Expectations

- robust, evidence-based evaluation of performance
- capacity for cross project comparison
- track progress within an organization
- build understanding of the quality of engagement and how it can be improved



What IS a scorecard?
































eg The chocolate scorecard*

Company	Popular Product(s)	Traceability & Transparency	Living Income	Child & Forced Labour	Deforestation & Climate	Agroforestry	Agrichemical Management	Overall
								
								
								
								



* <https://www.chocolatescorecard.com/scorecards/>

Visually simple but...

Company	Popular Product(s)	Traceability & Transparency	Living Income	Child & Forced Labour	Deforestation & Climate	Agroforestry	Agrichemical Management	Overall
								
								
								
								

Visually appealing

Tells an instant story

Simple but...

A lot of information is being summarised in 1 egg/bunny

Traceability: multiple scorers answer 26 questions; scorers compare results; discussion with other category scorers, agree on score

<https://www.chocolatescorecard.com/scorecards/>

The contract development & management scorecard

- Literature scan for relationship quality and buy-in indicators
- Draft propositions for testing
- Develop a fictitious scenario to test propositions
- Organise and run 5 scenario workshops
- Collate and analyse scenario workshop data
- Organise and conduct 9 interviews with senior procurement professionals
- Transcribe and analyse interviews
- Draft a set of measures
- Test measures
- Revise measures based on testing



Beta version scorecard

Development measures
Tendering measures
Contract measures
Delivery measures
Operations measures

Measure (statement of excellence)

Market sounding was informed by or included people with expertise in local community and stakeholder needs and values.*

The process to determine the **procurement model** was **appropriately communicated** to the engagement team(s)

The process for determining the **procurement model** drew on **best available evidence & expertise** about local community & stakeholder needs & values

The process to determine **prioritisation & scope of engagement** in the contract was **appropriately communicated** to the engagement team(s)

The process to determine **prioritisation & scope of engagement** in the contract **drew on best available evidence & expertise** about local community and stakeholder needs and values

The process to determine **engagement responsibilities** was **inclusive** (involving all parties with engagement responsibilities)

The process to determine **engagement responsibilities** was **appropriately communicated** to the engagement team(s)

The process for **determining contractors** with engagement responsibilities drew on **best available evidence** including prior performance

The **tendering process** fostered **shared values for engagement** with the short-listed applicants

The **scope & priority** given to engagement in the contract was appropriate relative to risk & community expectations

Roles, responsibilities & accountabilities for engagement & governance were clearly articulated & allocated in the contract

An appropriate engagement **budget** was specified in the contract (including contingencies & within consortia communications)

Internal communication requirements among parties with engagement responsibilities were specified including handover protocols, complaints management & performance assessment

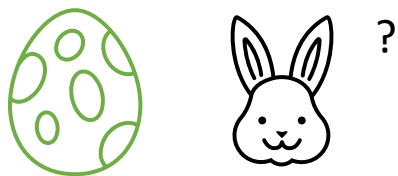
Parties with engagement responsibilities **interacted at or above the frequency specified** including in the management of emergent issues

All key project partners were **committed** to the purpose, value & approach to engagement stipulated in the contract

The contract helped achieve **project objectives** associated with engagement (eg social, economic, reputational, timeframe)

Sample self-assessment output

- Assessor gives each statement of excellence a 5 point rating from “strongly disagree” or performed poorly to “strongly agree” or performed at the highest level
- The adjacent matrix is based on 1 response
- A final scorecard could have 10 columns (1 for each standard).
- Traffic light approach – can identify project points **doing well** or **needing attention**
- **Note: an overall score here would be:**



Strongly disagree
Disagree
Neither agree not disagree
Agree
Strongly agree

Contract development & management
Development
Market sounding
Model selection communicated
Model evidence-based
Engagement prioritisation communicated
Engagement prioritisation evidence-based
Tendering
Responsibilities inclusive
Responsibilities communicated
Contractor selection evidence-based
Process fostered shared values
Contract
Priority appropriate
Roles & responsibilities clear
Appropriate budget specified
Internal communication requirements specified
Delivery & operations
Engagement team interact
Project partners committed
Contract helped achieve objectives

Lessons learned and ongoing challenges

Co-design is critical but time-consuming

Calculation (the technical stuff):

- Applying numbers to social phenomena
- Weighting – are all measures equal?

Who applies it?

- Self-assessment vs auditor
- Proponents? Contractors? Non-CE?
- Issues with adoption of tools

Sensitivity (common issue for evaluation)

- Communicating poor performance especially in commercial contexts

Let's continue the conversation!

Post questions and comments in the IAIA24 app.



#iaia24

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