**Inclusive Economic Indicators Lab – Project success checklist and self-assessment**

At the end of the IEI Lab, the Brookings Metro team asked the participating core teams to assess themselves against a set of project success criteria and to put together an action plan to improve on any criterion where the team had more work to do.

Organizations, or teams of organizations interested in an inclusive economic indicators project can use this project success checklist, self-assessment, and action planning guide at intervals throughout the project to guide efforts and identify areas of work needing attention.

**Project success checklist**

**Great content**

1. **A compelling case** for why a framework and indicators project are needed that will resonate with key stakeholders and sectors.
2. **A clear and inspiring vision** for what inclusive growth can achieve in the region.The vision is regionally specific and locally relevant.
3. **A new or revised set of indicators** that connects to the vision, is easily understood/intuitive, and can be embraced by multiple sectors.

**Strong leadership**

1. **Strong, credible senior champions (e.g. CEOs, other leaders)** who will convey the importance of the indicators project as well as its messages.
2. **Committed and capable staff leadership** who can integrate the strategy and tactics, has sufficient time/capacity, and is vested with accountability/authority.
3. **An institutional home and capacity** that will bring stability, swing capacity, and convening power.

**Visibility and buy-in**

1. **A creative communications plan** that enables the indicators project to rise above the noise and be recognized as the primary indicator of economic vibrancy.
2. **Accessibility of the indicators project** through a website with hyperlinks to other key institutions or some other mechanisms (e.g. series in media).
3. **Endorsement by key institutions with clear commitments** such as building indicators into strategies, linking them to individual performance measures, regularly sharing results with boards.
4. **An engagement plan** to introduce the indicators project to influencers throughout the community.

**Sustainability**

1. **Multi-year funding** to keep the indicators project updated with sufficient funding for communication.
2. **Sustainability plan** that outlines a timeline for data updates moving forward and the person(s) responsible for those updates.

**Project team self-assessment**

The project success checklist captures an ideal outcome of any inclusive economic indicators project. Consider the checklist and give your team and current indicators efforts a score from 1 to 5 on each of the criteria. The scores should be determined with input from either the entire team or an appropriate cross section of your team.

**Score key:**

**1** – Our team does not have a sense of what we need to do to meet this criterion.

**2** –Our team has not made much progress on this criterion. We have some sense of what we need to do to meet this criterion, but have not outlined a timeline, set of tasks, or lead on those tasks.

**3** – Our team has made some progress on this criterion, but there is still a fair amount of work to do. We need to do some additional work to clarify what work needs to be done, on what timeline, and/or the person(s) responsible for the work.

**4** – Our team is confident about our current position on this criterion. There is still some work to be done and we have clearly outlined what that work is, what timeline it will be completed on, and who is responsible for seeing it through to completion.

**5** – Our team feels very confident about our current position on this criterion. There is very little or no additional work needed in this area. In the comments section, please provide some commentary explaining your score.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria** | **Score** | | | | | **Comments** |
| **Great content** | | | | | | |
| **A compelling case** for why a framework and indicators project are needed that will resonate with key stakeholders and sectors | 1 | 2 | 3 | 4 | 5 |  | |
| **A clear and inspiring vision** for what inclusive growth can achieve in the region.The vision is regionally specific and locally relevant | 1 | 2 | 3 | 4 | 5 |  | |
| **A new or revised set of indicators** that connects to the vision, is easily understood/intuitive, and can be embraced by multiple sectors | 1 | 2 | 3 | 4 | 5 |  | |
| **Strong leadership** | | | | | | |
| **Strong, credible senior champions (e.g. CEOs, other leaders)** who will convey the importance of the indicators project as well as its messages | 1 | 2 | 3 | 4 | 5 |  | |
| **Committed and capable staff leadership** who can integrate the strategy and tactics, has sufficient time/capacity, and is vested with accountability/authority | 1 | 2 | 3 | 4 | 5 |  | |
| **An institutional home and capacity** that will be bring stability, swing capacity, and convening power | 1 | 2 | 3 | 4 | 5 |  | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Visibility and buy-in** | | | | | | |
| **A creative communications plan** that enables the indicators project to rise above the noise and be recognized as the primary indicator of economic vibrancy | 1 | 2 | 3 | 4 | 5 |  |
| **Accessibility of the indicators project** through a website with hyperlinks to other key institutions or some other mechanisms (e.g. series in media) | 1 | 2 | 3 | 4 | 5 |  |
| **Endorsement by key institutions with clear commitments** such as building indicators into strategies, linking dashboard to individual performance measures, regularly sharing results with boards | 1 | 2 | 3 | 4 | 5 |  |
| **An engagement plan** to syndicate the indicators project with influencers throughout the community | 1 | 2 | 3 | 4 | 5 |  |
| **Sustainability** | | | | | | |
| **Multi-year funding** to keep the indicators project updated with sufficient funding for communication | 1 | 2 | 3 | 4 | 5 |  |
| **Sustainability plan** that outlines a timeline for data updates moving forward and the person(s) responsible for those updates | 1 | 2 | 3 | 4 | 5 |  |

**Action plan**

For each self-assessment criterion scored less than a 5, complete the following:

* Identify the activities that need to be completed to achieve a score of 5.
* Put together a timeline over which those activities will be completed.
* Identify the person(s) responsible for conducting the activities.
* Outline a mechanism to hold the responsible person(s) accountable to the timeline.

As you build your action plan, be sure to also consider how the different pieces fit together in terms of workload and timing.