Assessing Program & Project Performance with the 'THAI-SCALE' Technique & Template [1]

Dr. Kenneth F. Smith, PMP

Background The **Thai Scale** technique for targeting and assessing program & project performance was originally conceived and developed in 1996, together with an accompanying template to facilitate various computations for comparative analysis and progress reporting of State Enterprise – aka 'Quango' -- programs. Applied and field-tested on several disparate programs by my 'Dream Team' of Thai auditors, it earned after-action accolades from the program sponsors.

Subsequently, I introduced the Thai Scale technique to regional participants at the Mekong Institute in Khon Kaen, Thailand where I conducted intermittent project management & evaluation seminars for several years under Asian Development Bank (ADB) auspices -- although it never made the Project Management Institute's *'PMBOK,'* or other 'Prime' P/PM publications. Since then, through limited consultancies and PM&E courses -- as the need arose -- I have continued to advocate and teach the Thai Scale, along with other project management techniques.

However, Ashley Majika's article last month[2] alerted me it would be timely to inform other contemporary practitioners who might benefit from a tried-and-true technique – *now on its 25th Anniversary* – for application to their programs & projects.

Here then -- *to bridge the generational gap* -- is an exposition of the Thai Scale.

The prime purpose of programs and projects is to improve situations in some manner for selected areas &/or their inhabitants. Consequently, in addition to the implementation status – *i.e. whether it is on-schedule &/or on-budget* -- the ***three most pertinent issues*** for on-going program and post-project performance assessment are:

1. "**How much better is the situation than before, *or likely to be in the near future*?**"

[1] How to cite this article: Smith, K. F. (2021). Assessing Program & Project Performance with the 'THAI-SCALE' Technique & Template, *PM World Journal*, Vol. X, Issue XII, December.
[2] Majika, A. (2021). Customer service and project performance at state-owned enterprises: Towards a sustainable mechanism; PM World Journal, Vol. X, Issue XI, November

2. "**Are the changes – *now or anticipated* -- up to expectation?**" *and also*

3. **"How ***best*** to assess, summarize and report the foregoing results to program / project sponsors *and other stakeholders*?"**

Given appropriate organizational management objectives, project management quality delivery & service indicators with baseline situation data, quantitative targeting, and follow-up, those questions *should be* easy to answer. [3] All too often during my career however, I encountered programs and projects where baseline data had not been compiled; meaningful indicators were not established; quantitative targets were either not set or were unrealistically high; and implementation performance was not systematically tracked.

In such instances *instead of assessing project performance with on-hand data,* evaluation teams used most of their time during brief on-site visits hurriedly gathering superficial data through *ad hoc* rapid reconnaissance studies.

As a consequence, inadequate anecdotal reports for stakeholders were the norm for these programs and projects -- *replete with scattered unsubstantiated statistics, and unverifiable assumptions & opinions submitted* as 'facts.' Performance assessments were also produced in a wide variety of rating scales: from subjective nominal to rank-ordered ordinal *(some low to high, others high to low),* sometimes interval; but rarely ratio data. **In short, mostly an unsatisfactory situation!**

In 1996 I had an extensive Asian Development Bank (ADB) consultancy to assist the Auditor General's (AG) Office of the Government of Thailand improve 'management audit'[4] performance assessment practices of State Enterprise management, service delivery and customer satisfaction.[5] In addition to '**Vulnas**,'[6] another technique I devised with Tanom & Karanee (my principal AG Thai counterparts) for my Thai auditor 'Dream

[3] Other issues -- such as sustainability, collateral benefits & unintended consequences, as well as whether further financing and follow-up activity are required – need much more in-depth probing and analysis.

[4] i.e. extending auditing practices beyond traditional financial aspects, to include other dimensions of organizational program & project management.

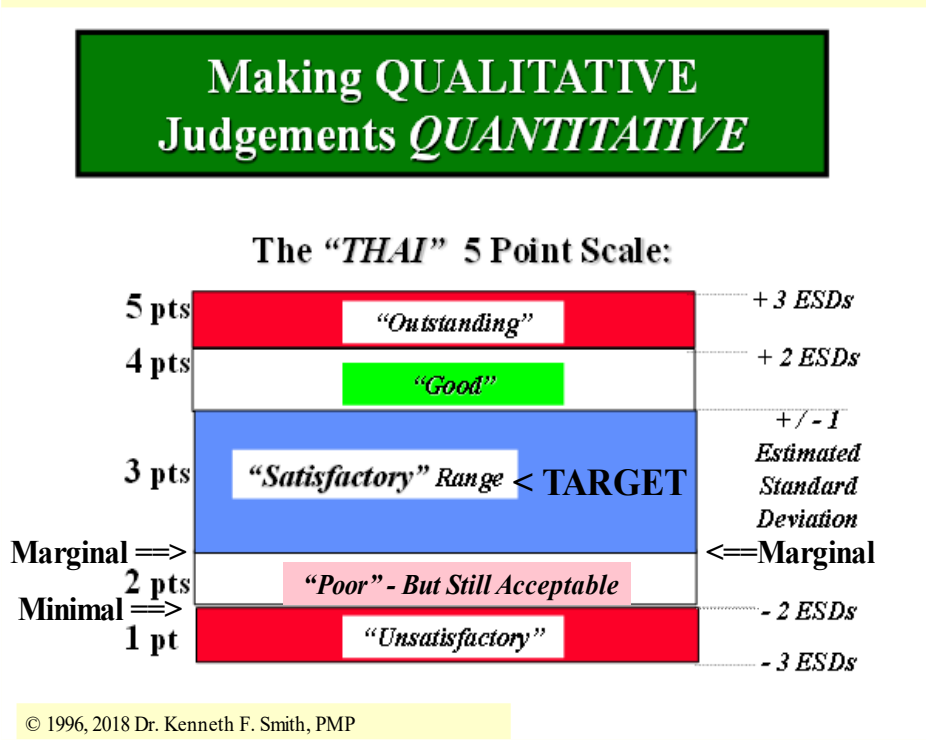
[5] Unfortunately, the situation that most state-owned enterprises consistently fail to meet project deadlines, and the lack of customer satisfaction with state-owned enterprises -- *as discussed by Ashley Majika regarding South Africa in last month's PMWJ article* –-- are generic problems; not confined to one country.

[6] Smith, K. F. (2021). Internal Controls for Project Managers: How to Audit Yourself Before the Auditor Audits, PM World Journal, Vol. X, Issue VII, July

Team' to employ was ***systematic application of the standard deviation***[7] -- essentially *'an old wine in new bottle'* approach for organizations to **target, evaluate** and **report project performance.**

To make the standard deviation concept palatable to recipient stakeholders, we equated the normal probability distribution scale to the five-banded Thai national flag (*with its double-wide central band*), and dubbed it the '**Thai Scale**' - as indicated in Figure 1:

Figure 1



Adapting the Estimated Standard Deviation (ESD) as

One ESD = (Target – Baseline) / 6

[7] The standard deviation normal distribution curve is the basis for statistical probability assessment. Some instructors use the range and distribution of their students test results to grade them '*on the curve*.' The Program Evaluation & Review Technique (PERT) used a '*quick & easy*' *estimated* standard deviation (ESD) in conjunction with the Critical Path Method (CPM) where One ESD = (Pessimistic – Optimistic)/6 to estimate activity duration probabilities as well as to subsequently assess performance. **We also used the ESD to estimate organizational management, program & project performance, as described herein.**

The width of the bands for establishing subjective indicator performance standards of Key Performance Indicators (KPIs) for internal organizational management, project delivery and customer service variables – *as well as quantitative schedule & budget implementation* targets -- were thus ***proportional to the range of target magnitudes;*** and also enabled **actual** performance to be rated compared to either the **target, the baseline or both**.[8]

While still amenable to subjective ordinal ranking for targeting during planning as well as after-the-fact performance assessment (preferably with quantitative data), **the Thai scale is best employed statistically – i.e. *with probabilities* -- that can be readily computed, given baseline amounts, targets and actuals.**
We emphasized that programs and projects adopt a more systematic approach **during planning** to establish reasonable and attainable quantifiable targets, given the prevailing local situation.

- **If Targets are reasonable,** but are set Too Low, those responsible for implementation will become complacent, and eventually, *performance will decline.*

- **If Targets are unreasonable**, and/or set Too High, those responsible for implementation will become demoralized at repeated failure, and eventually, *performance will decline.*

Applying this concept, **reasonable targets can initially be established by extrapolation based on past trends or growth rates -- *instead of ceiling estimates.* [For instance,** the ***larger the Target over the Baseline,*** the ***harder it will be to achieve Statistically-Significant results*** – i.e. Outstanding (or Unsatisfactory) – and the **greater the probability that performance will be within the wider Satisfactory range**.] **After-the-fact-evaluation can also determine whether targets were unrealistically high, or unnecessarily low;** assuming either a linear or curvilinear relationship. **However, if no target was established**, performance can still be evaluated in terms of the extent of ***improvement over the baseline.*** **Even without a baseline**, performance can be rated as ***percentage variance from a quantitative target.***

[8] [**NOTE:** The "**Satisfactory**" range encompasses ***1 standard deviation below* the Target** which -- *although within the normal probability range of expectation* – was **unacceptable** on one project to some stakeholders in the Thai Government and ADB. **Their objection was subsequently ameliorated by reverting from a five- to a 4-point scale, and the target was reset at the *base* of the 'Satisfactory' range.**]

To simplify computations and assessments, I created a **Thai Scale template** for users to *simply enter 'driver' data in the YELLOW CELLS*, as illustrated below and on the following pages.

Figure 2

KEY STATISTICS for PLANNING & EVALUATION — Dr. Kenneth F. Smith, PMP

PLANNING — © Dr. Kenneth F. Smith, PMP Sep 1996, Lotus123; Excel Sep 2005, Oct 2021

1. LINEAR REGRESSION ANALYSIS [Based on Historical Data]

GIVEN: PERFORMANCE DATA for Up to Ten Prior Time Periods as outlined below

THEN: a REALISTIC LINEAR REGRESSION ESTIMATE for the NEXT TIME PERIOD is: **7.20**

1. Delete the data in the cells in the YELLOW "Y" column below — i.e. **column D, cells D12 through D21**. HOWEVER — **DO NOT DELETE THE WHITE BLOCK D11**.
2. Enter YOUR time-series data in the YELLOW cells — from the Baseline and up to nine previous time periods.
3. **If you have data for ALL 10 time periods (i.e. the Baseline plus ALL NINE previous periods), the Linear Regression estimate for the next time period will be shown in the WHITE block at the Upper Right.**
4. **OTHERWISE, THE RESULTS WILL BE INACCURATE AND YOU MUST FOLLOW THE EXCEL REGRESSION ANALYSIS INSTRUCTIONS BELOW**

		X *Time*	Y *Data*
	NEXT TIME PERIOD?		7.2
NOW	BASELINE	0	4
	Last Period	-1	7
		-2	8
		-3	5
		-4	4
		-5	4
		-6	4
		-7	3
		-8	2
		-9	1

EXCEL REGRESSION ANALYSIS INSTRUCTIONS:

1. Enter Data in left "Y" Column for BASELINE and UP TO 9 previous Time Periods
2. Put Cursor in "D11" i.e. the "WHITE Block" Next Time Period under "Y" Data Column.
3. **Hit the Delete Key.**
4. From the MENU ABOVE, SELECT: "Formulas", "*Insert Function*", Scroll to "FORECAST LINEAR" Select "OK." Cursor Moves to **x** block; Type **1**. Move Cursor to Known Y's
5. For the **Known "y's"** "Paint" the Y (Data) Column ONLY for Periods with Data. NOTE: **DO NOT HIT THE "ENTER" KEY.**
6. Move Cursor to **Known "x's"** "Paint" the X (Time) Column for same Time Periods.
7. Select **OK**. The Linear Regression will be shown in a block at the Upper Right.

The Estimated Standard Deviation (ESD) around this **Estimate** is	1.99
This is an extrapolation of a Trend **WITHOUT the Project**, and with reasonable (i.e. 95% probability) could be as much as 2 standard deviations above the Estimate, or:	11.18
Therefore, to improve over the "Without Project" Trend, a **REASONABLE PROJECT TARGET** should be **at least 3 standard deviations above the Trend,** i.e.:	**13.17**
And 1 Standard Deviation around **this Target** = ((Target - Baseline)/6), i.e.:	1.53
THUS Scaled PERFORMANCE STANDARDS around thisTarget are as follows:	
1. MARGINAL SATISFACTORY STANDARD	**11.64**
2. MINIMUM ACCEPTABLE STANDARD	**10.11**

Figure 3

2. "QUICK & EASY" TARGETTING [Based on Historical Data]

GIVEN: PERFORMANCE DATA for Up to Ten Prior Time Periods

Time Pd	-9	-8	-7	-6	-5	-4	-3	-2	-1	CURRENT BASELINE
Data #s	4	3	2	5	4	7	6	6	7	5

THEN: for the NEXT TIME PERIOD	
A REALISTIC ESTIMATE is	6
& the Estimated STANDARD DEVIATION is	1
This is the Trend **WITHOUT the Project**, and with 95% probability could be as much as 2 standard deviations above the Estimate, or:	7.47
Therefore, a **REASONABLE PROJECT TARGET** should be **at least 3 standard deviations above the Trend,** i.e.:	8
And 1 Standard Deviation around **this Target** = ((Target - Baseline)/6) =	0.55
THUS Scaled PERFORMANCE STANDARDS Should Be:	
1. **MARGINAL SATISFACTORY STANDARD**	8
2. **MINIMUM ACCEPTABLE STANDARD**	7

3. ALTERNATELY

With Only BASELINE DATA & a PREDETERMINED TARGET

IF BASELINE =	5	& PREDETERMINED TARGET is =	9
THEN: the Estimated STANDARD DEVIATION is			0.67
END PERFORMANCE: & MARGINAL Satisfactory Standard Should be			8.33
With a MINIMUM ACCEPTABLE Standard of			7.67

4. TO DETERMINE REASONABLE "INTERMEDIATE" TARGETS

With Only the BASELINE DATA & a PREDETERMINED TARGET ABOVE

IF BASELINE =	5	& PREDETERMINED TARGET is =	9
BUT the TARGET is	1	TIME PERIODS BEYOND the BASELINE	

LINEAR INTERPOLATION

The INTERMEDIATE TARGET @ PERIOD	5	*SHOULD BE*	25

Figure 4

5. EXPONENTIAL (CURVILINEAR) "Q&E" TARGETTING TO DETERMINE REASONABLE FUTURE TARGETS

With Only a Historical Point "WITHOUT" the PROJECT, and BASELINE DATA

IF the Historical Point is =	**40**	**& the Project BASELINE is**	**77**
And the Baseline for the Project is	**9**	**Time periods beyond the Historical Point**	
Percentage Growth is	92.50%	**Then the % Growth Rate per time unit is**	**7.55%**
And the Growth Estimate	**8**	Time periods beyond the Baseline would be	**138**

& the Estimated STANDARD DEVIATION is	10
This is the Trend **WITHOUT the Project**, and with 95% probability could be as much as 2 standard deviations above the Estimate, or:	**158**
Therefore, a **REASONABLE PROJECT TARGET** should be **at least 3 standard deviations above the Trend,** i.e.:	**168**
And 1 Standard Deviation around **this Target** = ((Target - Baseline)/6) =	15
THUS Scaled PERFORMANCE STANDARDS Should Be:	
1. MARGINAL SATISFACTORY STANDARD	**153**
2. MINIMUM ACCEPTABLE STANDARD	**138**

Figure 5

6A. PERFORMANCE EVALUATION Compared to the TARGET

Using a 5 point THAI SCALE [Positive]

GIVEN: ACTUAL PERFORMANCE of 58 **&**

Baseline &/or Target Data :

Threshold	Numerical	Nominal	Letter Grade	Std Deviation Range	# Range	
	5	OUTSTANDING	A	Above +2 SDs	Above	84
	4	GOOD	B	+1.1 to +2 SD	78	84
	3	SATISFACTORY	C	+ 1 SD		77
Marginal		*[Range from Target]*		-1 SD up to	63	
Minimal	2	POOR	D	- 1.1 to - 2 SDs	56	62
	1	UNACCEPTABLE	F	Below - 2SDs	Below	56

GIVEN:

BASELINE	27
TARGET	70
Std Devn	7.17
EVALUATION IS:	
Numerical	2
Nominal	POOR
Letter Grade	D
Std Dev'ns	-1.67

6B. PERFORMANCE as a Percentage Deviation from TARGET

on a 5 point SCALE [Positive]

GIVEN (ABOVE): ACTUAL PERFORMANCE of

And Management's Performance Difference CRITERIA is

With Baseline & Target Settings as

THEN:	Numerical	Nominal	Letter Grade	% Deviation Range	# Range	
	5	OUTSTANDING	A	7 & Above	Above	74
	4	GOOD	B	4 6	73	74
	3	SATISFACTORY	C	3		72
Marginal				-3	68	
Minimal	2	POOR	D	-4 -6	66	67
	1	UNACCEPTABLE	F	-7 & Below	Below	66

Performance	58
% Deviation	-17 %
% +/-	3 %

GIVEN (ABOVE):

BASELINE	27
TARGET	70
EVALUATION IS:	
% Deviation	-17 %
Numerical	1
Nominal	UNACCEPT
Letter Grade	F

6C. PERFORMANCE as a Percentage Deviation from BASELINE

on a 5 point SCALE (Positive)

Where "Greater than One Level" Performance Difference Criteria must be attained for a Satisfactory Rating

GIVEN (ABOVE): ACTUAL PERFORMANCE of

And Management's Performance Difference CRITERIA is

With Baseline as

THEN:	Numerical	Nominal	Letter Grade	% Deviation Range	# Range	
	5	OUTSTANDING	A	Above 9	Above	29
	4	GOOD	B	7 9	30	29
Marginal	3	SATISFACTORY	C	4 6	29	29
Minimal	2	POOR	D	0 3	27	28
	1	UNACCEPTABLE	F	-1 -3	Below	27

Note: Satisfactory band same as other ranges

Performance	58
% Deviation	115 %
% +/-	3 %

GIVEN (ABOVE):

BASELINE	27
TARGET	70
EVALUATION IS:	
% Deviation	115 %
Numerical	5
Nominal	OUTSTANDING
Letter Grade	A

Analysis can also be adjusted for a Four Point Scale, WHERE THE TARGET IS SET AT THE BASE OF THE 'SATISFACTORY' RANGE, as follows:

Figure 6

7A. PERFORMANCE EVALUATION Compared to the TARGET

Using a 4 point SCALE [i.e. for Asian Development Bank (ADB)]

Where Performance must be Above the Target to achieve a Satisfactory Rating

GIVEN: ACTUAL PERFORMANCE of 58 **&**

Baseline &/or Target Data :

Threshold	Numerical	Nominal	Letter Grade	Std Deviation Range	# Range	
	4	Highly Satisfactory	A	Above +1 SD	Above	78
Marginal	3	**SATISFACTORY**	B	0 to +1 SD	70	77
Minimal	2	Partly Satisfactory	C	Below - 1 SD	63	69
	1	Unsatisfactory	D	Below -1 SD	Below	63

Note: Satisfactory band same as other ranges

GIVEN:	
BASELINE	27
TARGET	70
Std Devn	7.17
EVALUATION IS:	
Numerical	1
Nominal	UnSatisfactory
Letter Grade	D
Std Dev'ns	-1.67

7B. PERFORMANCE as a Percentage Deviation from TARGET

on a 4 point ADB SCALE [Positive]

GIVEN (ABOVE): ACTUAL PERFORMANCE of

And Management's Performance Difference CRITERIA is

With Baseline & Target Settings as

THEN:	Numerical	Nominal	Letter Grade	% Deviation Range		# Range	
	4	Highly Satisfactory	A	Above	12	Above	78
Marginal	3	**SATISFACTORY**	B	0	12	70	78
Minimal	2	Partly Satisfactory	C	-12	0	68	69
	1	Unsatisfactory	D	Below	-12	Below	68

Note: Satisfactory band same as other ranges

Performance	58
% Deviation	-17 %
% + / -	12 %
GIVEN (ABOVE):	
BASELINE	27
TARGET	70
EVALUATION IS:	
% Deviation	-17 %
Numerical	1
Nominal	UnSatisfactory
Letter Grade	D

7C. PERFORMANCE as a Percentage Deviation from BASELINE

on a 4 point THAI SCALE [Positive]

Where "Greater than One Level" Performance Difference Criteria must be attained for a Satisfactory Rating

GIVEN (ABOVE): ACTUAL PERFORMANCE of

And Management's Performance Difference CRITERIA is

With Baseline as

THEN:	Numerical	Nominal	Letter Grade	% Deviation Range		Range	
	4	Highly Satisfactory	A	Above	20	Above	32
Marginal	3	**SATISFACTORY**	B	11	20	31	32
Minimal	2	Partly Satisfactory	C	0	10	27	30
	1	Unsatisfactory	D	Below	0	Below	27

Note: Satisfactory band same as other ranges

Performance	58
% Deviation	115 %
% + / -	10 %
GIVEN (ABOVE):	
BASELINE	27
TARGET	70
EVALUATION IS:	
% Deviation	115 %
Numerical	4
Nominal	Highly Satis
Letter Grade	A

Figure 7

PLANNING

SITUATION B.

1. With Only BASELINE DATA & PREDETERMINED

MINIMUM ACCEPTABLE STANDARD

IF BASELINE =	3	& MINIMUM ACCEPTABLE STANDARD is =	2
THEN:		the Estimated STANDARD DEVIATION is	0.25
		PERFORMANCE: THE TARGET Should be	1.5
		With a MARGINAL Satisfactory Standard of	1.75

PERFORMANCE EVALUATION

GIVEN: ACTUAL PERFORMANCE of 3 **& MINIMUM ACCEPTABLE STD** 2

1. 5 Point "THAI SCALE"

as Determined Earlier: Predetermined

	Numerical	Nominal	Letter Grade	Std Deviation Range
Threshold	5	OUTSTANDING	A	Above +2 SDs
	4	GOOD	B	+1.1 to +2 SD
	3	SATISFACTORY	C	+ 1 SD
Marginal		*[Range from Target]*		-1 SD up to
Minimal	2	POOR	D	- 1.1 to - 2 SDs
	1	UNACCEPTABLE	F	Below - 2SDs

BASELINE	3
TARGET	1.5
Std Devn	0.25

EVALUATION IS:

Numerical	5
Nominal	OUTS
Letter Grad	A
Std Dev'ns	6

2. PERFORMANCE AS A PERCENTAGE DEVIATION FROM TARGET

5 Point "THAI SCALE"

GIVEN: ACTUAL PERFORMANCE of 3

And a Significant Difference Interval of 9 %

Predetermined

BASELINE	3
TARGET	1.5

THEN:

Numerical	Nominal	Letter Grade	% Deviation Range
5	OUTSTANDING	A	19 & Above
4	GOOD	B	10 18
3	SATISFACTORY	C	9
	[Range from Target]		-9 up to
2	POOR	D	-10 -18
1	UNACCEPTABLE	F	-19 & Below

EVALUATION IS:

% Deviation	100
Numerical	5
Nominal	OUTS
Letter Grad	A

Figure 8

PLANNING

SITUATION C.

1. With Only BASELINE DATA & a PREDETERMINED MARGINAL SATISFACTORY STANDARD

IF BASELINE =	3	& MARGINAL SATISFACTORY STANDARD	4
THEN:		the Estimated STANDARD DEVIATION is	0.20
		PERFORMANCE: THE TARGET Should be	4.2
		With a MINIMUM ACCEPTABLE Standard of	3.8

PERFORMANCE EVALUATION

GIVEN: ACTUAL PERFORMANCE of 5 **& MARGINAL SATISFACTORY STD** 4

1. 5 Point "THAI SCALE"

as Determined Earlier: Predetermined

BASELINE 3
TARGET 4.2

Threshold	Numerical	Nominal	Letter Grade	Std Deviation Range
	5	OUTSTANDING	A	Above +2 SDs
	4	GOOD	B	+1.1 to +2 SD
	3	SATISFACTORY	C	+ 1 SD
Marginal		*[Range from Target]*		-1 SD up to
Minimal	2	POOR	D	- 1.1 to - 2 SDs
	1	UNACCEPTABLE	F	Below - 2SDs

EVALUATION IS:

Std Devn	0.2
Numerical	5
Nominal	OUTS
Letter Grade	A
Std Dev'ns	4

2. PERFORMANCE AS A PERCENTAGE DEVIATION FROM TARGET

GIVEN: ACTUAL PERFORMANCE of 5

And a Significant Difference Interval of 4 %

Predetermined

BASELINE 3
TARGET 4.2

THEN:

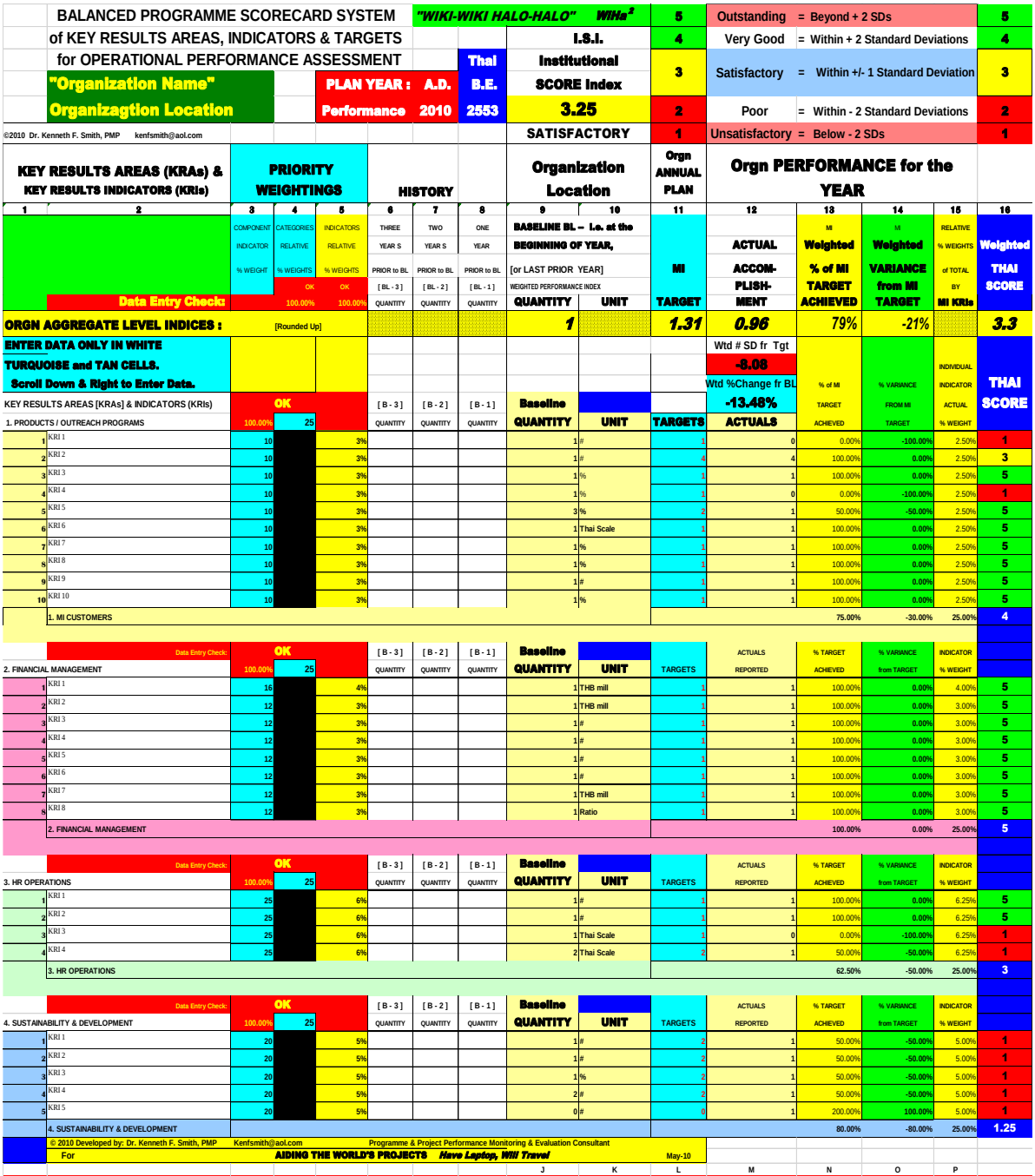
Numerical	Nominal	Letter Grade	% Deviation Range %
5	OUTSTANDING	A	9 & Above
4	GOOD	B	5 8
3	SATISFACTORY	C	4
	[Range from Target]		-4 up to
2	POOR	D	-5 -8
1	UNACCEPTABLE	F	-9 & Below

EVALUATION IS:

% Deviation	19
Numerical	5
Nominal	OUTS
Letter Grade	A

Performance for each and every one of the organization's Key Performance Indicators (KPIs) could thus be easily calculated. [Subsequently -- *years later* -- I developed an Organization Balanced Scorecard template for the Mekong Institute (*proprietary data deleted*), as indicated in Figures 9 & 10.]

Figure 9



	BALANCED PROGRAMME SCORECARD SYSTEM					"WIKI-WIKI HALO-HALO" WIHa²		5	Outstanding = Beyond + 2 SDs				5
	of KEY RESULTS AREAS, INDICATORS & TARGETS						I.S.I.	4	Very Good = Within + 2 Standard Deviations				4
	for OPERATIONAL PERFORMANCE ASSESSMENT				Thai		Institutional	3	Satisfactory = Within +/- 1 Standard Deviation				3
	"Organization Name"		PLAN YEAR :	A.D.	B.E.		SCORE Index						
	Organizagtion Location		Performance	2010	2553		3.25	2	Poor = Within - 2 Standard Deviations				2
	©2010 Dr. Kenneth F. Smith, PMP kenfsmith@aol.com						SATISFACTORY	1	Unsatisfactory = Below - 2 SDs				1
	KEY RESULTS AREAS (KRAs) & KEY RESULTS INDICATORS (KRIs)	PRIORITY WEIGHTINGS			HISTORY			Organization Location		Orgn ANNUAL PLAN	Orgn PERFORMANCE for the YEAR					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
		COMPONENT INDICATOR % WEIGHT	CATEGORIES RELATIVE % WEIGHTS	INDICATORS RELATIVE % WEIGHTS	THREE YEAR S PRIOR to BL	TWO YEAR S PRIOR to BL	ONE YEAR PRIOR to BL	BASELINE BL – i.e. at the BEGINNING OF YEAR, [or LAST PRIOR YEAR] WEIGHTED PERFORMANCE INDEX		MI TARGET	ACTUAL ACCOM-PLISH-MENT	MI Weighted % of MI TARGET ACHIEVED	MI Weighted VARIANCE from MI TARGET	RELATIVE % WEIGHTS of TOTAL BY MI KRIs	Weighted THAI SCORE
	Data Entry Checks:	OK 100.00%	OK 100.00%		[B - 3] QUANTITY	[B - 2] QUANTITY	[B - 1] QUANTITY	QUANTITY	UNIT						
	ORGN AGGREGATE LEVEL INDICES :	[Rounded Up]						1		1.31	0.96	79%	-21%		3.3
	ENTER DATA ONLY IN WHITE TURQUOISE and TAN CELLS. Scroll Down & Right to Enter Data.										Wtd # SD fr Tgt -8.08 Wtd %Change fr BL -13.48%	% of MI TARGET ACHIEVED	% VARIANCE FROM MI TARGET	INDIVIDUAL INDICATOR ACTUAL % WEIGHT	THAI SCORE
	KEY RESULTS AREAS [KRAs] & INDICATORS (KRIs)	OK			[B - 3] QUANTITY	[B - 2] QUANTITY	[B - 1] QUANTITY	Baseline QUANTITY	UNIT	TARGETS	ACTUALS				
	1. PRODUCTS / OUTREACH PROGRAMS	100.00%	25												
1	KRI 1	10		3%				1	#	1	0	0.00%	-100.00%	2.50%	1
2	KRI 2	10		3%				1	#	4	4	100.00%	0.00%	2.50%	3
3	KRI 3	10		3%				1	%	1	1	100.00%	0.00%	2.50%	5
4	KRI 4	10		3%				1	%	1	0	0.00%	-100.00%	2.50%	1
5	KRI 5	10		3%				3	%	2	1	50.00%	-50.00%	2.50%	5
6	KRI 6	10		3%				1	Thai Scale	1	1	100.00%	0.00%	2.50%	5
7	KRI 7	10		3%				1	%	1	1	100.00%	0.00%	2.50%	5
8	KRI 8	10		3%				1	%	1	1	100.00%	0.00%	2.50%	5
9	KRI 9	10		3%				1	#	1	1	100.00%	0.00%	2.50%	5
10	KRI 10	10		3%				1	%	1	1	100.00%	0.00%	2.50%	5
	1. MI CUSTOMERS											75.00%	-30.00%	25.00%	4
	Data Entry Check:	OK			[B - 3]	[B - 2]	[B - 1]	Baseline			ACTUALS	% TARGET	% VARIANCE	INDICATOR	
	2. FINANCIAL MANAGEMENT	100.00%	25		QUANTITY	QUANTITY	QUANTITY	QUANTITY	UNIT	TARGETS	REPORTED	ACHIEVED	from TARGET	% WEIGHT	
1	KRI 1	16		4%				1	THB mill	1	1	100.00%	0.00%	4.00%	5
2	KRI 2	12		3%				1	THB mill	1	1	100.00%	0.00%	3.00%	5
3	KRI 3	12		3%				1	#	1	1	100.00%	0.00%	3.00%	5
4	KRI 4	12		3%				1	#	1	1	100.00%	0.00%	3.00%	5
5	KRI 5	12		3%				1	#	1	1	100.00%	0.00%	3.00%	5
6	KRI 6	12		3%				1	#	1	1	100.00%	0.00%	3.00%	5
7	KRI 7	12		3%				1	THB mill	1	1	100.00%	0.00%	3.00%	5
8	KRI 8	12		3%				1	Ratio	1	1	100.00%	0.00%	3.00%	5
	2. FINANCIAL MANAGEMENT											100.00%	0.00%	25.00%	5
	Data Entry Check:	OK			[B - 3]	[B - 2]	[B - 1]	Baseline			ACTUALS	% TARGET	% VARIANCE	INDICATOR	
	3. HR OPERATIONS	100.00%	25		QUANTITY	QUANTITY	QUANTITY	QUANTITY	UNIT	TARGETS	REPORTED	ACHIEVED	from TARGET	% WEIGHT	
1	KRI 1	25		6%				1	#	1	1	100.00%	0.00%	6.25%	5
2	KRI 2	25		6%				1	#	1	1	100.00%	0.00%	6.25%	5
3	KRI 3	25		6%				1	Thai Scale	1	0	0.00%	-100.00%	6.25%	1
4	KRI 4	25		6%				2	Thai Scale	2	1	50.00%	-50.00%	6.25%	1
	3. HR OPERATIONS											62.50%	-50.00%	25.00%	3
	Data Entry Check:	OK			[B - 3]	[B - 2]	[B - 1]	Baseline			ACTUALS	% TARGET	% VARIANCE	INDICATOR	
	4. SUSTAINABILITY & DEVELOPMENT	100.00%	25		QUANTITY	QUANTITY	QUANTITY	QUANTITY	UNIT	TARGETS	REPORTED	ACHIEVED	from TARGET	% WEIGHT	
1	KRI 1	20		5%				1	#	2	1	50.00%	-50.00%	5.00%	1
2	KRI 2	20		5%				1	#	2	1	50.00%	-50.00%	5.00%	1
3	KRI 3	20		5%				1	%	2	1	50.00%	-50.00%	5.00%	1
4	KRI 4	20		5%				2	#	2	1	50.00%	-50.00%	5.00%	1
5	KRI 5	20		5%				0	#	0	1	200.00%	100.00%	5.00%	1
	4. SUSTAINABILITY & DEVELOPMENT											80.00%	-80.00%	25.00%	1.25
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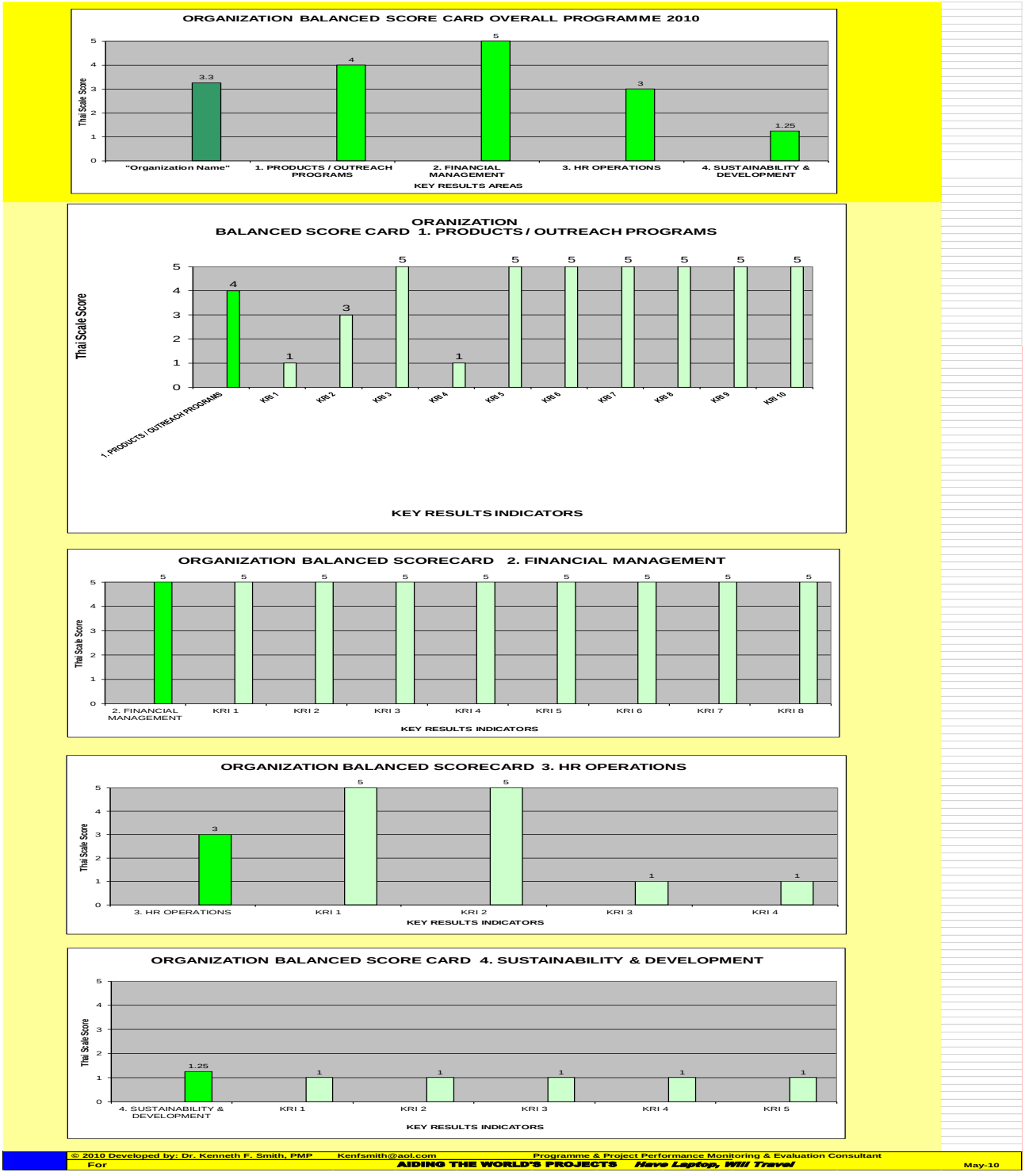
	For AIDING THE WORLD'S PROJECTS Have Laptop, Will Travel									May-10					

Figure 10


ORGANIZATION BALANCED SCORE CARD OVERALL PROGRAMME 2010
Thai Scale Score
3.3
4
5
3
1.25
"Organization Name"
1. PRODUCTS / OUTREACH PROGRAMS
2. FINANCIAL MANAGEMENT
3. HR OPERATIONS
4. SUSTAINABILITY & DEVELOPMENT
KEY RESULTS AREAS
ORANIZATION
BALANCED SCORE CARD 1. PRODUCTS / OUTREACH PROGRAMS
Thai Scale Score
4
1
3
5
1
5
5
5
5
5
5
5
1. PRODUCTS / OUTREACH PROGRAMS
KRI 1
KRI 2
KRI 3
KRI 4
KRI 5
KRI 6
KRI 7
KRI 8
KRI 9
KRI 10
KEY RESULTS INDICATORS
ORGANIZATION BALANCED SCORECARD 2. FINANCIAL MANAGEMENT
Thai Scale Score
5
2. FINANCIAL MANAGEMENT
KRI 1
KRI 2
KRI 3
KRI 4
KRI 5
KRI 6
KRI 7
KRI 8
KEY RESULTS INDICATORS
ORGANIZATION BALANCED SCORECARD 3. HR OPERATIONS
Thai Scale Score
3
5
5
1
1
3. HR OPERATIONS
KRI 1
KRI 2
KRI 3
KRI 4
KEY RESULTS INDICATORS
ORGANIZATION BALANCED SCORE CARD 4. SUSTAINABILITY & DEVELOPMENT
Thai Scale Score
1.25
1
1
1
1
1
4. SUSTAINABILITY & DEVELOPMENT
KRI 1
KRI 2
KRI 3
KRI 4
KRI 5
KEY RESULTS INDICATORS
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For
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Have Laptop, Will Travel
May-10

The "**Misfortune 500**" **Index** and template[9] is a related tool for State Enterprises (and other organizations) to assess the level of **Customer Satisfaction** with their service. The antithesis of top-rated **Fortune 500** companies, ***Mis*fortune** helps organizations focus attention on their downside by soliciting satisfaction level feedback from customers on a five-point **Thai Scale** rating and generating an overall Misfortune rating on a 0 to 500 range; with 500 being the worst case. The variable threshold enables the organization to establish, then periodically raise the acceptable standard.

Figure 11

The "Misfortune 500" Index System

for Evaluating Customer Satisfaction of Program Performance

NOTE: *A* ***Worst Case*** *would be* ***100% Unsatisfactory****, i.e. 100% @ Thai Scale Rating of 1*
Equivalent to a ***Misfortune Index of 500****; i.e. 100 x a reverse weighting of 5*

ENTER DATA IN YELLOW CELLS

SET YOUR **THRESHOLD INDEX** FOR ***UNACCEPTABLE*** PERFORMANCE = **80**

A	B	C	D	E	F
Performance Level Categories	Thai Scale Rating	Number of Respondents	Percentage of Respondents *(Rounded)*	Reverse Weight	Misfortune 500 Index
		1032		*[of B]*	*[D x E]*
Outstanding	5	**70**	7%		
Good	4	**231**	22%		
Satisfactory	3	**630**	61%		
Poor	*2*	***76***	*7%*	*4*	*29*
Unsatisfactory	*1*	***25***	*2%*	*5*	*12*
			Misfortune 500 Index =		**42**

Performance on this Indicator is Acceptable

For those of you who followed the description this far and are interested in applying the Thai Scale for Planning &/or Evaluating your programs and projects, these templates[10] are available for free – *together with many more for Program & Project Planning, Monitoring, Analysis and Evaluation* -- upon proof of purchase of my book **Project Management PRAXIS**, available from Amazon.

[9] In response to a felt need, in 1997 I conceptualized and created the Misfortune 500 index and template in 1997 during a subsequent program management & evaluation extended consultancy under Asian Development Bank (ADB) auspices for the Philippine National Economic Development Authority (NEDA).

[10] While the Thai Scale, Misfortune Index and Balanced Score Card templates are unique, I'm sure many more-sophisticated Balance Score Cards have been developed since 2010 by IT experts. Nevertheless, the Thai Scale concept and Misfortune Index for rating performance could still prove useful.

About the Author

Dr. Kenneth Smith

Honolulu, Hawaii
& Manila, The Philippines

Initially a US Civil Service Management Intern, then a management analyst & systems specialist with the US Defense Department, Ken subsequently had a career as a senior foreign service officer -- management & evaluation specialist, project manager, and in-house facilitator/trainer -- with the US Agency for International Development (USAID). Ken assisted host country governments in many countries to plan, monitor and evaluate projects in various technical sectors; working 'hands-on' with their officers as well as other USAID personnel, contractors and NGOs. Intermittently, he was also a team leader &/or team member to conduct project, program & and country-level portfolio analyses and evaluations.

Concurrently, Ken had an active dual career as Air Force ready-reservist in Asia (Japan, Korea, Vietnam, Thailand, Indonesia, Philippines) as well as the Washington D.C. area; was Chairman of a Congressional Services Academy Advisory Board (SAAB); and had additional duties as an Air Force Academy Liaison Officer. He retired as a 'bird' colonel. After retirement from USAID, Ken was a project management consultant for ADB, the World Bank, UNDP and USAID.

He earned his DPA (Doctor of Public Administration) from the George Mason University (GMU) in Virginia, his MS from Massachusetts Institute of Technology (MIT Systems Analysis Fellow, Center for Advanced Engineering Study), and BA & MA degrees in Government & International Relations from the University of Connecticut (UCONN). A long-time member of the Project Management Institute (PMI) and IPMA-USA, Ken is a Certified Project Management Professional (PMP®) and a member of the PMI®-Honolulu and Philippines Chapters.

Ken's book -- **Project Management PRAXIS** (available from Amazon) -- includes many innovative project management tools & techniques; and describes a "**Toolkit**" of related templates available directly from him at kenfsmith@aol.com on proof of purchase of PRAXIS.

To view other works by Ken Smith, visit his author showcase in the PM World Library at https://pmworldlibrary.net/authors/dr-kenneth-smith/