Organization Designation Authorization (ODA)
Scorecard User Guide

REVISION HISTORY

Revision	Description of Change	Effective Date	Approval
0	Original		

Table of Contents

Section 1. Overview

1.1 Purpose

This User Guide provides the requirements and best practices for completing and using an Organization Designation Authorization (ODA) Scorecard, including the solicitation of input from ODA holders. The scorecard provides data that is the foundation for productive dialogues leading to action plans, where needed, and enables the Federal Aviation Administration (FAA) and industry to come together to work collaboratively to strengthen OMT-ODA relationships.

The scorecard team can be reached at: 9-AVS-ODA-Scorecard@faa.gov

1.2 Scope

This User Guide applies to managing offices of ODAs with design approval authority related to Type Certification (TC) and Supplemental Type Certification (STC).

1.3 Related documents

FAA Order 8100.15, Organization Designation Authorization Procedures, is related to this User Guide.

1.4 Summary

The FAA and industry are invested in ODAs and share a desire to optimize the ODA system. A well-organized and mature ODA, along with a well-organized and mature organization management team (OMT), provide an effective and efficient system for the certification of products and articles. The scorecard provides the opportunity to identify and address areas for improvement that are essential to the success of both parties. The scorecard allows the FAA and the ODA holder to assess each other's performance and satisfaction with the ODA program and associated certification activity. The scorecard also provides data that can differentiate local from national issues, so the appropriate group can work them. Currently, the scorecard is only applicable to the design aspects of TC and STC ODAs.

In Section 2., "Responsibilities," the instructions for the completion of the scorecard data collection is directive in nature. The use of the word "must," and the use of action verbs such as "conduct," "do," "notify," etc., indicate that the actions are required to complete the scorecard correctly.

The use of words such as "may" or "should" in this User Guide indicates that an action is a best practice and the Scorecard user is encouraged to follow.

Section 2. Responsibilities

This section provides the requirements for completing an ODA scorecard.

2.1 ODA Office

Prior to March 1 of each year the ODA Office will establish a schedule and plan for completion of the ODA Scorecards. The schedule will be updated and shared monthly with the Organizational Management Team (OMT) leads. The ODA Office will also maintain a current version of the Scorecard Worksheet and the online ODA Scorecard Assessment.

2.2 AIR-500/-700/-800 Managers

In accordance with the annual schedule and plan established by the ODA Office, ensure completion of the Scorecard Worksheet and online ODA Scorecard Assessment applicable to your office.

Best Practice #1. The FAA and Industry should use the annual schedule and planning information to prepare for the upcoming scorecard cycle.

Best Practice #2. The FAA and Industry should use the Scorecard Worksheet to collect the participation and compliance data to generate the completed scorecard and roll-ups. While either party may enter data into the worksheet, checking the accuracy of the completed scorecard is a joint effort. This User Guide contains descriptions, information, and best practices associated with the Scorecard Worksheet.

2.3 Process Steps

a. ODA Holder

(1) The ODA administrator will receive an email with a link to complete the online ODA Scorecard Assessment and to download the Scorecard Worksheet.

(2) Once ready to complete, the ODA administrator (or designee) will click the link to begin the online assessment.

(3) Once the online assessment is completed, the data will be automatically submitted to the ODA Office and added to the scorecard database.

(4) The ODA administrator (or designee) will work with the OMT Lead to complete the Scorecard Worksheet.

(5) Submit final Scorecard Worksheet to the OMT Lead.

b. OMT Lead

(1) The OMT Lead will receive an email with a link to complete the online ODA Scorecard Assessment and to download the Scorecard Worksheet.

(2) Once ready to complete, the OMT Lead will click the link to begin the online assessment.

(3) Once the assessment is completed, the data will be automatically submitted to the ODA Office and added to the scorecard database.

(4) The OMT Lead works with the ODA holder to complete the Scorecard Worksheet and validate for accuracy.

(5) Submit final Scorecard Worksheet to the ODA Office: 9-AVS-ODA-Scorecard@faa.gov

c. ODA Office (AVS-60)

(1) Send individual emails to each OMT Lead and ODA administrator with a personalized link to complete the online ODA Scorecard Assessment and Scorecard Worksheet.

(2) Compile the results of the online assessments and worksheets into the scorecard database.

(3) Publish the individual and national ODA Scorecards.

Section 3. ODA Scorecard Assessment

The ODA Scorecard Assessment is a qualitative assessment which uses a 5-point scale to measure performance that covers seven expectations. The data is intended to provide a measure of the FAA's and ODA holder's level of satisfaction with each other's performance as well as with the ODA program and associated certification activity. The data entry on this form is the same for all scorecard types.

3.1 Process

The OMT Lead and ODA holder will receive separate emails with unique links to take the online assessment. This link is personalized, and although it is preferred that the original recipient of the email fill out the questionnaire it can be forwarded to a designee to fill out.

There are templates available for download to help collect the data prior to submitting. Click on the link(s) below to download the most recent templates.

ODA Administrator Template

OMT Lead Template

3.2 Welcome Screen

Upon clicking the link, the ODA administrator and OMT Lead will receive similar but slightly different welcome screens. Each screen's language is tailored to provide next step instructions.

3.3 Rating Scale

When first entering the assessment, a message at the top of the screen explains the 5-point scale. The scale is used to measure whether the respondent believes the other party is meeting expectations. This data measures satisfaction in meeting those expectations and is represented as **1** being the least acceptable and **5** being most acceptable. The scale is defined as follows:

1. **1 - Consistently Not Meeting**: Performance consistently does not meet expectations. No positive trends exist, and significant improvement is needed.
2. **2 - Not Meeting**: Performance is not meeting expectations. Some positive trends exist however, some improvement is needed.
3. **3 - Meets but needs Improvement**: Performance is meeting expectations. Some negative trends exist, and some improvement is needed.
4. **4 - Meets with some Negative Events**: Performance is meeting expectations. Some negative events may exist however, no improvement is needed.
5. **5 - Consistently Meets:** Performance consistently meets expectations. No negative trends exist, and no improvement is needed.

3.4 General Information

The first three questions of the assessment are requesting general information to validate the respondent and the associated company.

Email Address: Please enter the email address of the person filling out the form.
1. If you are not the original recipient of the link, please use your email address and not the recipients.

Company Name: The name of the ODA Company

ODA – Type: Please indicate the type of authorizations this form will represent.
2. IMPORTANT: If you have multiple authorizations, you can fill out a single form that represents each (check each box). If you prefer to fill out separate forms, you will receive additional links for each authorization (only check the box each form represents).

3.5 Assessments

There are seven expectations that you will deliver a rating of. Each category will list the documented expectations above the selection bar, and you are required to select your RATING of the other party in meeting these expectations. This is based on the 5-point scale (1-least acceptable to 5-most acceptable).

The ODA holder expectations can be found in Appendix A and OMT expectations can be found in Appendix B.

Each category has a comment box. This is optional, but highly encouraged to provide comments based on the rating that was selected. There is a 20,000-character limit in the comment box.

* **Continuous Improvement**

Expectations

- The FAA is working on continuous improvement (clearer guidance, quicker turnaround times, more consistency)
- The FAA provides timely feedback for proposed corrective actions

	Consistently Not Meeting	Not Meeting	Meets but needs Improvement	Meets with some Negative Events	Consistently Meets
Rating	○	○	○	○	○

Please list reasons for the selected rating

3.6 End of Assessment

At the end of the assessment, there is an option to provide overall general comments of the FAA/ODA performance. Generally, information not previously captured should be provided here. This section is optional.

Additional FAA Performance Notes

Additional notes on the assessment by the ODA holder of the FAA's performance over the Reporting Period.

Once you have completed the assessment, you can submit by hitting the "DONE" button. Upon completion, the assessment will process to the ODA Office scorecard database. The original recipient of the email will receive a link to download a copy of the responses. It is recommended you download this for record keeping.

If you need to change or update your answers, the original link will remain open until the closing period of the assessment. At that time, the form will be closed, and all recordings will be final. After you have submitted the assessment, if you open the original link, it will take you to your filled out form where you are able to make changes.

Section 4. Scorecard Worksheet

The scorecard worksheet collects quantitative data on participation and compliance activities. The worksheet is supplemental to the online ODA Scorecard Assessment and requires coordination between the ODA holder and OMT to compile and validate for accuracy.

Worksheet can be downloaded here:

https://www.faa.gov/other_visit/aviation_industry/designees_delegations/delegated_organizations/information_/2024-Scorecard

4.1 Main Screen

The main screen of the worksheet provides a general overview of the collection segments. Generally, this screen is informational only and requires no data collection. The two main categories, **participation** and **compliance**, are seen in the middle and have links that can bring the end-user to that particular tab.

To navigate, the end-user can click on the blue links to navigate between tabs or simply click on the desired tab at the bottom of the screen.

Organization Designation Authorization (ODA) Scorecard Data Collection Worksheet

The data collection worksheet is maintained by the AVS-60 ODA Office and seeks to collect and compile data from the ODA holder and Organization Management Team (OMT).

The FAA and industry are heavily invested in ODAs and both share a desire to optimize the ODA system. A well-organized and mature ODA, along with a well-organized and mature OMT, provide an effective and efficient system for the certification of products and articles. The scorecard provides the opportunity to identify and address, via appropriate means, areas for improvement that are essential to the success of both parties.

Questions or Comments: 9-AVS-ODA-Scorecard@faa.gov

Participation	Go to Participation

The data is intended to provide a measure of the overall efficiency of the project initiation process and the level of FAA involvement in a company's projects. It is commonly referred to as "Measures of FAA Involvement & Overall Efficiency."

The participation tab has been updated to remove hidden columns and locks cells that exist between input areas. Although the top and right area are locked, the end-user can copy/paste from other sources to fill in required area.

Compliance	Go to Compliance

The data is intended to provide a measure of an ODA holder's compliance and safety performance, and is commonly referred to as "Measures of Company Compliance/Safety."

Process for Completion

In addition to this worksheet, the ODA holder and OMT will separately complete an online assessment based on a personalized link from the AVS-60 ODA Office. This assessment is intended to provide a measure of the FAA's and ODA holder's level of satisfaction with each other's performance as well as with the ODA program and associated certification activity. Upon completion of the assessment, both parties will jointly complete this worksheet. The information contained in this worksheet is then validated by the OMT, and submitted to the AVS-60 ODA Office scorecard inbox at 9-AVS-ODA-Scorecard@faa.gov.

4.2 Participation Data

Participation data is intended to provide a measure of the overall efficiency of the project initiation process and the level of FAA involvement in a company's projects. It is commonly referred to as "Measures of FAA Involvement & Overall Efficiency."

FULL INSTRUCTIONAL GUIDE: Details on how to fill out the Participation Tab can be found on the public FAA Site:

https://www.faa.gov/other_visit/aviation_industry/designees_delegations/delegated_organizations/information_/Scorecard-Participation-Instruction-Guide

IMPORTANT: The data entry on this tab is not the same for all scorecard types.

Counting Compliance Documents/Findings: This is an identification of the method used to calculate the Percent Retained value. There are two methods available 1) Compliance Findings – percent retained by compliance finding, and 2) Compliance Documents – percent retained by compliance document (e.g., checklist item or project deliverable).

Information. The method is selectable using a drop-down list in the upper left and each method modifies the data entry column headers.

Best Practice. STC and TC-Type Design Scorecards should use the Compliance Findings method; TC-Major Programs Scorecards should use the Compliance Documents method. In any case, once a method is established for a Company's scorecard(s), subsequent scorecards should use the same method to ensure that effective trending information is maintained.

All white boxes in the header section should be filled out, even pending no project data is entered in the rows below.

Information. The Metrics and key performance indicator (KPI) section on the far right will update based on the input of each project. Specifics for how these are counted/measured can be found in the full instructional guide.

4.3 Compliance Data

This section provides descriptions of key terms used on the Compliance tab of the Scorecard Worksheet, along with information and best practices regarding collecting and entering the data into each of the four data entry sections (C.1, C.2, C.3, C.4). The data is intended to provide a measure of an ODA holder's compliance and safety performance and is commonly referred to as "Measures of Company Compliance/Safety." The data entry on this tab is the same for all scorecard types.

a. Compliance Tab Section C.1

This is the header section of the Compliance Tab. It sets the Compliance Reporting Period as the 12-month period equal to the current annual scorecard cycle.

Best Practice. These Measures of Company Compliance/Safety should include all data, even if it is not associated with any approvals, authorizations, certificates issued, or acceptance of ICA made under an ODA. Comments should be included in the associated notes area to explain this distinction if it significantly affects the reported data in any section.

b. **Compliance Tab Section C.2**

This is the Safety Measures data entry section of the Compliance Tab. These measures are intended to provide visibility into the potential safety impact of the company's products as they relate to the National Air Space.

Airworthiness Standard Non-Compliances: The number of airworthiness standard non-compliances related to the company's products reported from all sources during the Compliance Reporting Period.

Total Airworthiness Directives (ADs): The total number of ADs published in the Federal Register as a final rule during the Compliance Reporting Period against any company product with a TC or STC design approval.

ADs Related to Airworthiness Standard Non-Compliances: The number of "Total ADs" that are related to an airworthiness standard non-compliance (this includes ADs related to airworthiness standard non-compliances predating the Compliance Reporting Period).

Safety Measures Notes: A text box for FAA or Company comments associated with this section to further explain or evaluate the data. *Max character limit = 32k*

Best Practice. The FAA should assess the year-to-year data trends for this section and provide an evaluative comment. In general, a downward trend with the data in this section is viewed as positive.

c. **Compliance Tab Section C.3**

This is the System Measures data entry section of the Compliance Tab. These measures are intended to provide visibility into the company's ability to comply with requirements associated with writing and following robust certification procedures, and their ability to identify self-improvement opportunities.

Significant Non-Compliances: Six types of discrepancies (i.e., non-compliances) that could lead to corrective action are defined in FAA Order 8100.15 (see information below). Significant non-compliances are a count of only the number of Airworthiness Standard, Regulatory, and FAA Policy Non-Compliances (refer to the second Best Practice below regarding certain discrepancies of this type) identified by all sources, in any manner, during the Compliance Reporting Period.

Information. FAA Order 8100.15, Chapter 6. Delegated Organization Inspection Program (DOIP), defines six types of discrepancies (i.e., non-compliances) that could lead to corrective action:

(1) Airworthiness Standard Non-Compliance. The approval does not meet the airworthiness standards.

(2) Regulatory Non-compliance. A non-compliance with the regulations other than the airworthiness standards including a non-compliance with the FAA- approved procedures manual.

(3) FAA Policy Non-compliance. A non-compliance with related orders, policy memos, or handbook bulletins that apply to functions performed under the ODA.

(4) Technical Discrepancy. Technical discrepancies in the compliance or data package.

(5) Procedures Manual Discrepancy. Discrepancies in the FAA-approved procedures manual or referenced documents. The manual does not comply with the requirements of the ODA

order, or the manual's procedures are inadequate or incomplete to perform a process (refer to the third best practice below regarding certain discrepancies of this type).

   (6) Special Emphasis Item. Any other condition identified that needs further action.

Best Practice #1. Similar to the DOIP approach, conditions requiring corrective action that are found via OMT supervision, ODA holder self-audit, or brought to either party's attention by any other means, should first be classified as one of the six types listed above to assist with determining the number of Significant Non-Compliances.

Best Practice #2. The FAA and Company should take care when counting Significant Non-Compliances so that the number does not contain Technical Discrepancies, Procedures Manual Discrepancies, or Special Emphasis Items.

Best Practice #3. When the procedures manual does not comply with the requirements of the ODA order, the non-compliance should be classified as a Procedures Manual Discrepancy, not a FAA Policy Non-compliance.

Significant Non-Compliances Identified by Company: The number of Significant Non-Compliances identified and reported by the ODA holder during the Compliance Reporting Period.

System Measures Notes: A text box for FAA or Company comments associated with this section to further explain or evaluate the data. *Max character limit = 32k*

Best Practice. The FAA should assess the year-to-year data trends for this section and provide an evaluative comment. In general, a downward trend with the data in this section is viewed as positive. It is also desirable for the gap between FAA and Company findings to narrow over time (or remain relatively small).

d. Compliance Tab Section C.4

This is the **Corrective Action Measures** data entry section of the Compliance Tab. These measures are intended to provide visibility into the company's willingness and ability to implement corrective action in a timely manner.

Information #1. For the purposes of the ODA Scorecard, a corrective action is considered to be the entirety of the action(s) needed to correct an identified condition requiring corrective action (i.e., non-compliance or discrepancy). It is not a count of the multiple discrete actions that may be taken to correct a condition. In other words, there is one corrective action for each condition requiring corrective action.

Information #2. For the purposes of the ODA Scorecard, each condition requiring corrective action should result in a corrective action plan which includes a committed corrective action completion date. Completion is the point at which all corrective action needed for that condition has been implemented. Following completion, all corrective action is verified as being implemented and effective, and then it is closed.

Best Practice. For each condition requiring corrective action, regardless of the number of discrete actions needed to correct the condition, a single committed completion date should be established, regardless of whether the corrective action is being worked jointly by the FAA and the ODA holder, or just the ODA holder.

Corrective Actions that were Open at End of Period: The total number of corrective actions, identified by all sources, in any manner, that were open on the last day of the reporting period. It is applicable to all six discrepancy types (Airworthiness Standard Non-Compliances, Regulatory Non-Compliances, FAA Policy Non-Compliances, Technical Discrepancies, Procedures Manual Discrepancies, and Special Emphasis Items).

Corrective Actions that were Closed During Period: The number of corrective actions, identified by all sources, in any manner, that were closed during the reporting period. It is applicable to all six discrepancy types (Airworthiness Standard Non- Compliances, Regulatory Non-Compliances, FAA Policy Non-Compliances, Technical Discrepancies, Procedures Manual Discrepancies, and Special Emphasis Items).

Information. A corrective action is considered closed when all corrective action for a given condition has been verified as being implemented and effective.

Best Practice. The FAA Managing Office and Company should discuss and come to agreement on the specific dates to be used for open and closed corrective action based on procedures manual content and/or local application of policy.

% of Corrective Actions Completed On Time: For the corrective actions included in the Open/Closed counts above, the percentage measure of on-time completion based on the committed corrective action completion dates that fell within the Compliance Reporting Period.

Information. A corrective action is considered complete when all corrective action for a given condition has been implemented by the ODA holder, but not yet verified by the FAA.

Best Practice. Occasionally, it may be necessary for a Company to request an extension to a committed corrective action completion date. Such requests should be made before the committed completion date passes and should include sufficient justification for extending the date. If the request is made after the committed completion date passes, then the extension should not be given and the original committed completion date will be used for this measure.

Average % Deadline Missed By: For the corrective actions included in the Open/Closed counts above, the average of the percent overage for each corrective action that did not meet the committed implementation due date.

Information. The percent overage is calculated as the number of calendar days past the due date, divided by the number of committed implementation calendar days, multiplied by 100.
Corrective Action Measures Notes: A text box for FAA or Company comments associated with this section to further explain or evaluate the data. *Max character limit = 32k*

Best Practice. The FAA should assess the year-to-year data trends for this section and provide an evaluative comment. In general, a downward trend in the number of corrective actions is viewed as positive. It is also desirable to have all corrective action implemented per committed timeframes.

Appendix A. ODA Holder Expectations

	Table 1 – Considerations for Company Performance
Continuous Improvement	• There is a commitment to continuous improvement. • The ODA holder's self-audits are robust and successful. • The ODA holder finds more significant issues than the FAA (should assess the quality of the findings, not just the quantity). • There is a good root cause analysis and corrective action procedure. • Re-audits typically show that corrective actions were effective. • The ODA holder meets its commitments for providing timely and acceptable corrective actions. • The organization finds and fixes issues without requiring FAA intervention.
Issue Resolution	• The ODA holder follows the appropriate issues resolution process and works issues at the lowest appropriate level before elevating. • The ODA holder brings significant issues to the attention of the FAA and allows sufficient time to collaborate on solutions. • The ODA holder addresses issues brought forth by the FAA in a timely manner.
Decision Making	• The ODA holder is responsive. • The company supports the ODA unit's decisions. • Responses to FAA questions are clear and, if not, the ODA holder is willing to provide additional clarity. • The ODA holder uses data to support conclusions.
Communication & Guidance	• The ODA holder exhibits good communication, professionalism, and responsiveness to OMT needs and queries. • The ODA holder and unit strive to resolve matters internally before asking the FAA for guidance. • The ODA holder accepts constructive guidance.
Project Involvement	• The ODA holder understands and utilizes its granted authority to the maximum extent possible. • The ODA holder takes on appropriate delegations that enable the FAA to be less involved in low-risk certification activities. • The ODA holder strives to understand the OMT's reasons for retention and, when applicable, works to address the issue that is causing it.

Project Management	• The ODA holder routinely meets their commitments. • Proposed schedules are reasonable, and when the schedules change significantly, the ODA holder updates the FAA to ensure their resources will still be available. • The ODA holder does not rely on the FAA to be their quality checker. • The ODA holder is proactive instead of waiting for the FAA to identify shortfalls. • The ODA holder addresses project related issues when appropriate.
Resources	• The ODA holder has sufficient resources. • The ODA holder maintains a full complement of capable unit members. • The ODA holder is supportive of the ODA units role and its UMs. • The ODA holder does not interfere with the ODA unit's ability to perform its functions. • The ODA holder does not interfere with the ODA administrator's ability to manage the ODA.

Appendix B. FAA Expectations

	Table 2 – Considerations for FAA Performance
Continuous Improvement	• The FAA is working on continuous improvement (clearer guidance, quicker turnaround times, more consistency). • The FAA provides timely feedback for proposed corrective actions.
Issue Resolution	• The FAA works with the ODA holder on the resolution of issues in good faith and are willing to listen to alternative approaches and work toward mutually acceptable solutions within regulations and policy.
Decision Making	• The FAA is responsive. • The OMT is responsive. • OMT responses are generally consistent despite changes in OMT members (this excludes inconsistencies driven by policy changes). • OMT responses are clear and, if not, the OMT is willing to provide additional clarity. • The OMT uses data to support conclusions.
Communication & Guidance	• FAA exhibits good communication, professionalism, and responsiveness to ODA holder needs and queries. • The FAA readily provides constructive guidance to UMs when requested by the holder. • The OMT is willing to get policy guidance from the procedural and technical policy offices when necessary.
Project Involvement	• The OMT's reasons for retention are provided and clear. • The OMT uses direct involvement in the critical path only when necessary. • The OMT has granted the maximum authority possible to the ODA and utilizes that authority to the maximum extent possible (notwithstanding performance issues).

Project Management	• The FAA routinely meets its commitments. • When FAA resource constraints significantly affect the schedule, it updates the ODA holder to minimize impact to the project • The FAA works with the ODA holder to improve its ability to achieve first-pass quality • The FAA promptly brings identified shortfalls to the attention of the ODA holder and monitors the resolution accordingly
Resources	• The FAA Management understands and appreciates the role of the OMT