

# SharePoint Governance Maturity Scorecard Worksheet

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A practical worksheet for scoring SharePoint governance maturity across ownership, permissions, lifecycle, metadata, records, search, Copilot readiness, adoption, and support.

## Use this worksheet to:

- Score current-state governance maturity from 1 to 5.
- Identify the lowest-scoring risk areas.
- Capture findings and priority actions.
- Turn the results into a governance roadmap.

## How to Use This Worksheet

Use this worksheet to score current-state SharePoint governance maturity. Score what actually happens in your environment, not what the policy says should happen. That difference is where many governance gaps become visible.

Invite the people who understand the environment from different angles: IT, SharePoint administrators, intranet owners, compliance or records stakeholders, department leaders, and site owners. A small group with the right knowledge is better than a large group with unclear responsibility.

### Recommended process:

- Review each governance category.
- Score the current state from 1 to 5.
- Capture the main finding for each category.
- Identify the highest-priority action.
- Review the total score and the lowest-scoring areas.
- Turn the results into a 30-day, 60-day, and 90-day roadmap.

### Scoring Scale

Score	Maturity Level	What It Means
1	<b>Reactive</b>	Governance is informal, inconsistent, or handled only after problems appear.
2	<b>Documented</b>	Expectations exist, but teams apply them unevenly across sites, libraries, and departments.
3	<b>Partially Applied</b>	Some owners, controls, and standards are in place, but execution varies by area.
4	<b>Operational</b>	Governance is part of normal SharePoint operations, reviews, and decisions.
5	<b>Adaptive</b>	Governance improves over time based on usage, risk, business change, and AI readiness.

### Score Bands

Total Score	Governance Band	What It Means
9-17	<b>Reactive Governance</b>	SharePoint is likely managed through cleanup efforts, one-off decisions, and individual knowledge.
18-26	<b>Emerging Governance</b>	Governance exists, but inconsistent execution creates risk, duplication, and user confusion.
27-35	<b>Operational Governance</b>	Core governance practices are working, but some areas need stronger review and refinement.
36-45	<b>Adaptive Governance</b>	Governance is active, measurable, and connected to business, compliance, adoption, and AI readiness.

**Important:** A high total score should not hide a critical weakness. If permissions, records, search, or Copilot readiness score low, treat those areas as priority risks even if the total score looks acceptable.

## SharePoint Governance Maturity Scorecard Worksheet

Use this worksheet to score your current state. Add the nine category scores to calculate your total score.

Governance Category	Score 1-5	Main Finding	Priority Action
Ownership			
Permissions			
Site Lifecycle			
Metadata			
Records and Retention			
Search			
Copilot Readiness			
Adoption			
Support Model			
<b>Total Score</b>			

After you complete the worksheet, review both the total score and the lowest individual categories. The lowest categories usually reveal the most urgent work.

- A low ownership score often means accountability is unclear.
- Weak permissions often point to security, oversharing, or Copilot readiness risk.
- Poor metadata usually explains search and content management problems.
- A low records and retention score often reveals lifecycle and compliance gaps.
- Weak support maturity usually means SharePoint will keep drifting after each project ends.

# Category Scoring Worksheets

## Category 1: Ownership

**What you are measuring:** Whether each important site, library, page, knowledge area, and business-critical content set has clear accountability.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Which person owns each major SharePoint site?
- Who owns each high-value document library?
- Where are backup owners documented?
- What happens when a site owner changes roles?
- How often do owners review content?
- Can users tell who owns important content?

## Category 2: Permissions

**What you are measuring:** Whether access is intentional, group-based, reviewed, documented, and aligned with business need.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Are permissions managed through groups?
- Which libraries use unique permissions?
- How often are external users reviewed?
- Where do sharing links remain active?
- Are sensitive libraries reviewed more often?
- Can access decisions be explained clearly?

## Category Scoring Worksheets

### Category 3: Site Lifecycle

**What you are measuring:** How SharePoint sites are requested, approved, created, reviewed, archived, and retired.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Who can request a new SharePoint site?
- What approval process exists before creation?
- Are site templates or standards used?
- Does each site have a business purpose?
- When are inactive sites reviewed?
- Which sites should be retired?

### Category 4: Metadata

**What you are measuring:** Whether content is organized to support findability, filtering, views, lifecycle management, records, and AI readiness.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Do important libraries use meaningful metadata?
- Where do content types add structure?
- Which naming standards need clarity?
- How are managed terms governed?
- Do views help users work with content?
- Does metadata support retention or records?

## Category Scoring Worksheets

### Category 5: Records and Retention

**What you are measuring:** Whether lifecycle, retention labels, records needs, archive decisions, and disposition processes are defined and applied.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Which content must be retained?
- What content should be archived?
- Where should disposition review apply?
- Are retention labels used intentionally?
- Do owners understand retention responsibilities?
- Are stale documents separated from active content?

### Category 6: Search

**What you are measuring:** Whether users can find trusted, current, and relevant content in SharePoint.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Can users find official content quickly?
- Where do outdated pages and files appear?
- How are duplicate answers reduced?
- Which libraries are authoritative sources?
- Do titles and metadata support search?
- How are search complaints tracked?

## Category Scoring Worksheets

### Category 7: Copilot Readiness

**What you are measuring:** Whether SharePoint content, permissions, structure, metadata, ownership, and lifecycle practices support trusted AI-powered responses.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Which libraries contain sensitive content?
- Where are the authoritative source libraries?
- Could stale files affect AI responses?
- Where might access be broader than intended?
- Are permissions reviewed before rollout?
- Do owners understand their AI readiness role?

### Category 8: Adoption

**What you are measuring:** Whether users and site owners understand how to use SharePoint correctly after launch.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Do users know where official content lives?
- Can site owners explain their responsibilities?
- Are governance standards written clearly?
- How are new owners trained?
- Where do departments request changes?
- Is adoption measured after launch?

## Category Scoring Worksheets

### Category 9: Support Model

**What you are measuring:** Whether SharePoint has a sustainable process for questions, improvements, governance reviews, ownership changes, and ongoing decisions.

Score	1	2	3	4	5
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**Main finding:**

**Priority action:**

**Questions to discuss:**

- Where do users go for SharePoint help?
- How are site owner questions handled?
- Who reviews governance issues?
- How are enhancement requests prioritized?
- Which governance review cadence exists?
- Does SharePoint have an advisory model?

## Turn Your Score Into a Governance Roadmap

A scorecard is useful only when it leads to decisions. After scoring all nine categories, choose the three lowest-scoring areas and turn them into a practical improvement plan.

### Top Three Governance Priorities

Priority Gap	Why It Matters	Owner	Next Decision

### 30-60-90 Day Roadmap

Timeframe	Actions to Complete	Success Signal
First 30 days		
Next 60 days		
Next 90 days		
Quarterly review		

Use the roadmap to keep governance practical. Start where weak governance creates the most risk, confusion, or rework. Then build a repeatable review cadence the organization can sustain.

#### Need help reviewing your SharePoint governance score?

dataBridge helps organizations assess SharePoint environments, define governance models, prepare for Copilot, strengthen permissions, and create sustainable operating models after launch.

Contact dataBridge to review your score and identify the right next steps.