



Catholic  
Charities  
Fort Worth

# Implementation of the Scorecard: A Case Study

Carolyn Hartsell, LMSW, LCPAA, LCCA



# Background Information

- Catholic Charities Fort Worth served 110,000 people in 2010.
- Have wide range of services to include 43 innovative programs
- Partnerships with multiple churches regardless of faith orientation in wide range of area (28 county diocese)
- 250+ employees working in wide range of areas



# Funding

Funding sources are widely varied. They include, but not limited to:

1. Department of Family and Protective Services
2. United States Council of Catholic Bishops
3. Office of Refugee Resettlement
4. United Way of Tarrant County
5. Veteran's Assistance funding
6. Private foundations
7. Agency fundraising



# Employee Compensation and Performance Reviews

- Previous system of review- job description and supervisory and employee review
- Agency Supportive Activities and Training
- \$1000 pay raises in January for all employees
- No performance based pay system in place
- Small bonuses for those that achieve degrees, licenses, etc.
- Commitment to Living Wage for employees



# Performance Based Pay

- It is the objective of Catholic Charities to establish and maintain a compensation policy that will:
  - Reflect our Values and Catholic Identity;
  - Attract and retain qualified employees to all levels within the organization;
  - Be externally competitive and internally consistent and fair;
  - Reward employees for high performance; and
  - Foster employee understanding and relationships.



# Change Process

- Establishing new job titles;
- Eliminating existing job titles when appropriate;
- Revising job descriptions for positions when appropriate; and
- Conducting periodic market comparisons to ensure that the agency's pay structure remains competitive.



# Salary Structure/Pay Bands

- Pay bands are a means by which an employer offers comparable financial reward to jobs that are of similar value. At Catholic Charities, jobs are assigned to pay bands based on a combination of internal and external considerations as described in the job evaluation process. This pay band structure will be used for all classified employees.
- The pay bands and ranges were developed based on:
  - the clustering of work scope evaluation results;
  - reporting relationships;
  - the marketplace analysis; and
  - generally accepted salary administration practices.



# Minimum Pay Band

***Minimum:*** The minimum of the pay band represents the lowest salary Catholic Charities would expect to pay to have the job performed.

- The area between the minimum and midpoint includes the salaries normally paid to:
  - individuals hired or promoted into a position who are learning the job; and
  - employees who are moving towards midpoint based on length of service and job performance.



# Midpoint Pay Band

- **Midpoint:** The midpoint of the pay band represents the salary level paid for a competent employee with considerable experience who performs all duties of the job at a satisfactory level. The area between the midpoint and maximum includes the salaries normally paid to:
  - employees who have been with the organization for a while and have moved up within the pay range due to merit increases;
  - employees within a position level whose demonstrated performance is above average or at a consistently superior level; and
  - individuals hired or promoted into a position who possess above average experience, expertise, or credentials.



# Maximum Pay Band

- ***Maximum:*** The maximum of the pay grade represents the highest amount Catholic Charities will generally pay to have the job performed. Employees whose salaries are at the maximum of the pay grade will generally not be eligible for increases based on meritorious job performance. Any further compensation due to merit increases will be paid as a quarterly salary bonus. Any exceptions must be approved by the President.



# Example of a Pay Band

- **Salary Grade: E2**
- *\$15.00 - \$18.00 (\$31,200 - \$37,440)*
- Assessment Specialist I
- Payroll Specialist
- Behavior Interventionist I
- Counselor I
- Case Manager I
- Case Worker II
- Foster Home Developer I
- Human Resources Generalist I
- Immigration Accredited Representative I
- In-Kind Specialist
- Instructor I
- Job Developer I
- Outreach Worker II
- Program Specialist
- Staff Accountant I
- Volunteer Specialist



# Moving towards the Scorecard

- Decisions behind change in evaluation
- Taking into account our agency mission and our values
- Rewarding employees for positive performance
- Opening dialogue with supervisor and employee on performance monthly
- Employee accountability for individual performance



# Moving towards Scorecard

- Morale- showing performance measures as an individual to a team
- Evaluation of program goals/Annual Work Plan
- Professional development
- Contribution to the agency as a whole rather than individual programs



# Review of Scorecard and Components

Carolyn Hartsell  
Director of Child Welfare  
Programs



Monthly Performance Update

August 2011

Performance Goal For This Month: Continue with ACT restructure and roll out of new plans for schedules and staffing structures.

Status of This Month's Goal: Schedules complete and will be rolled out on 9/1/11.

Development Goal For This Month: Attend final Social Innovator institute in September 2011.

Status of This Month's Goal: Last day is 9/13/11. Will be in attendance.

## Strategy Map Must-Do

Move Pathways to a responsive program.

[Did you do anything this month to move this measure forward?](#)

Pathways closed on 8/31/11.

## Mission and Values Goals

Hold regular fellowship for department.  
Individual Employee Goal 2  
Individual Employee Goal 3

[What actions did you take this month that promotes this goal?](#)

Scheduled training/Waiting for Superman 9/28/2011.

## Targets of Focus

### Target Performance

Strategy Map: Focus on outputs/outcomes

### Were the Desired Results Achieved?

Yes

### What, if any, adjustments need to be made?

Adjusted ways to monitor and track outputs/outcomes and will focus individually as well as department.

Accountability: Assure staff Ratio is maintained for ACT at all times

Yes

This has improved greatly.

Policies: Update and approve ACT policies & procedures

yes

Now, changing with COA updates. Due to me 10/1.

## Output and Outcome Objectives

### Weighted Objectives Performance Score

76.5%

### Desired Results

Child W. Department work plan outputs are met  
Child W. Depart. work plan outcomes are met  
Meet ACT revenue Goal  
Operate department within budget (less is better for ACT)  
Operate each program within budgeted expenses  
Case Record Review compliance @80% or above  
% of accomplished "life enhancing" outcomes  
Leading or participating in agency task force/committee  
Hold Quality Strategic Leadership Role (QSLR)  
Complete Personal Training Goals, at least 10 hrs.

### Measure

Monthly reports  
Monthly reports  
Monthly reports  
Monthly reports  
#REF!  
Financial statements  
Monthly reports  
Self Tracking  
Self Tracking  
Self Tracking (or certificate)

### Weight

15%  
15%  
10%  
10%  
10%  
10%  
10%  
5%  
5%  
5%

### Target

0.85  
0.85  
0.97  
0.99  
0.98  
0.8  
0.8  
2  
1  
10

### Unit

Percent  
Percent  
Percent  
Percent  
Percent  
Percent  
Percent  
Taskforce/Com.  
QSLR  
Hours

### Actual

68%  
77%  
65%  
84%  
76%  
75%  
89%  
1  
1  
0

### Performance

80%  
91%  
67%  
85%  
78%  
94%  
111%  
50%  
100%  
0%

### Employee Notes or Comments:

Performance Goal For Next Month: Continue focus for ACT changes

Development Goal For Next Month: Finish Social Innovator Project in September.



# Performance Appraisals

- Scorecard
- Supervisor Review
- Employee Review
- Peer Review
- Total Score=Amount of raise considered for employee.



# Components of Appraisal

- Scorecard - 40% of overall appraisal
- Agency Mission- 10% of overall score
- Agency Leadership-20% of overall score
- Agency Values-30% of overall score
- Overall Score balance=allotment for raise

Text boxes for comment from employee and supervisor



# Successes

- Staff feel more accountable and can “brag” on themselves
- Staff can see how their individual performance attributes to overall team goals; contributions to strategic plan
- Staff know performance and any concerns as the year goes on. Nothing should be a surprise!



# Challenges

- Change of process
- Reframing
- Keeping up with scorecard
- Concerns about performance on scorecard
- Keeping up with changes or job alterations



# Activity

- Break up into groups of 8-10
- Open forum regarding this process

## Consider:

1. Is this a process you could see implementing into your agency/program?
2. What do you see as the benefits and challenges?
3. How do you think your employees would react?
4. What would you do differently if you implemented this process?

\*Come back to large group to present ideas



# Contact Information

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