

## ActionAid International: People management scorecard

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### Background

[ActionAid International](#) (AAI) is a global movement of people working together in 47 countries to further human rights for all and defeat poverty.

Working globally poses a number of challenges for reporting on human resources (HR) and ensuring the standard and quality of HR policies, practices and procedures is upheld across the AAI federation.

Historically, reporting on basic HR information for the organisation's annual report or any accountability charters was a difficult and time-consuming process. Due to the lack of HR indices, the HR team was unable to contribute strategically or add value to key discussions and reports at federation level. HR was also unable to identify people-related risks to the organisation such as high staff turnover according to gender.

The HR team recognised the need to embed HR reporting across the federation. During 2012, a reporting template was developed for all 47 countries of operation and HR managers were asked to input into it. The final HR reporting template was presented to HR managers during the organisation's global HR workshop, which ensured country teams had a clear understanding of why the information was required of them.

AAI's first-ever global HR report was completed and shared with the federation in 2013. Since then, bi-annual HR reports have consistently been produced, published and shared with all staff.

With the global HR report in place and embedded in the organisation's ways of working, people management information was readily available for reporting purposes. However, AAI needed to think of a way to collect people-related information at country and international level and share it to assist decision-making and planning on people resourcing and management. This was the start of the idea to create a 'people management scorecard' for each country across the federation.

### Rationale

AAI's people management scorecard was created as a mechanism to collect people management information from different sources such as HR audits, HR reports and staff exit interviews, and track a country's progress in HR over a period of time. The aim was to provide management with a snapshot of each country's progress and benchmark and compare country indices to their region and globally. The scorecard would also be used as a transparent index in Country Director and HR Manager performance indicators. Finally the tool would celebrate and share best practices across the organisation's HR community and the whole organisation.

### Process

The process for developing the people management scorecard was as follows:

- A template was created identifying people management indices key to AAI and the sector.
- A description, including significance, was written on each index.
- A scoring mechanism was written with weights assigned to each category; the improvement of a country over periods would be cumulatively added and contribute to the final score.
- Countries were categorised according to size based on the number of staff, annual turnover and member status within AAI.
- Scores for two periods were pulled into the template for each country.

- Each country was assigned an overall final score. This score was then ranked overall (i.e. by all countries) and by size category.
- A presentation introducing the scorecard, rationale, process, indices and ranking methods was created and shared with the federation and HR managers during the global HR workshop.

## Resources required

- Strategic HR knowledge and analytical ability from the HR team to ensure the most relevant indices were identified and used.
- The time the HR reporting officer and the HR team allocated to the project. This included time deciding on and writing the indices, deciding on categorisation of scores and indices, and writing the formula to pull through the correct score.
- Data from the global HR report, HR audits, and global engagement survey scores to populate the indices.

## Factors for success

- Buy-in from management but mainly the federation's HR community was essential. This was because the international HR team relies on the federation-wide HR community to provide accurate information, submitted on time, to produce accurate people management scorecards.
- Ensuring a clear understanding of which indices will be measured and how this can be done in a fair and transparent manner.
- Successfully leveraging existing global HR information. It was however necessary to narrow the focus to individual countries for the information to be relevant at country level.
- The ability to add value to the organisation by providing regular, data-driven information on people management processes. Continuing to track the progress of countries and building on previous scores creates a culture of continuous improvement.
- The ability to compile people management information into a more meaningful format that can be used in decision-making at management level.

## Challenges overcome

- Reluctance from countries to provide data for the global HR report.
- Having different sources to check accuracy of information reported on by countries i.e HR audits, global HR reports and global staff engagement surveys.
- Clear understanding of the indices and their meaning to ensure that data is reported consistently.

## Results and impact

AAI's people management scorecard is a mechanism for describing and measuring how people and people management systems create value in an organisation. The scorecard is used to communicate key organisational objectives to AAI staff. It is also a good indicator of people management practices in the organisation.

The scorecard also:

- Provides tangible scores on how countries and HR are doing in terms of their people agenda. This results in a proactive, rather than re-active approach to issues due to the awareness of indices being tracked. It ensures countries pay attention to their people management indices and address issues as soon as risks are identified.

- Gives ownership of the organisation's people agenda to leadership. Reliable quantitative people management evidence and scores are readily available for the entire federation to assist with decision-making.
- Feeds into HR's organisational development (OD) strategy and assists AAI in HR audits, staff engagement action planning, strategy reviews, management reviews, and the membership development processes.
- Tracks progress and improvement of HR functions across the federation.
- Celebrates successes.
- Provides information to colleagues doing management reviews/audits.
- Provides an overview to new HR managers and country directors of the status of their respective HR functions.

## Lessons learned

- HR and people related information can be quantified and add value to organisation-wide reports and reviews.
- Ensuring the correct information is obtained is key to producing a valid people management scorecard. Clear and unambiguous communication by those generating the reports about what is needed is required to do this.
- The value-add of the scorecard needs to be shown to countries to obtain buy-in and ensure compliance with HR reporting. Sharing of completed reports and summarised data in a user-friendly format helps.
- Gathering various types of information is good, but being able to generate a consolidated report of all information has been most beneficial.
- The importance of data to substantiate decisions or observations is invaluable and supports AAI's value of transparency.

## Next steps

The people management scorecard will be augmented by the talent development index, an index that represents the robustness of a talent management and succession planning intervention. AAI has embarked on a talent management and succession pilot involving six countries across the federation. Currently the process of developing the people management scorecard is manual and time consuming. The next step would be to automate the process to cut down the time required to complete the report.

## Additional resources

A presentation on the people management scorecard [can be accessed here](#).

# **People Management Scorecard**

**FY , 2015**

**(Human Resources & Operations)**

**29<sup>th</sup> April , 2016**

# People Management Scorecard Rationale

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Sr.no	Key Measure	Unit Measure	Rationale
1	Country Engagement Quotient Score	%	Engagement scores are a true reflection of an engaged and high performing organisation research has empirically proven that highly engaged workforce adds direct value to the mission / business as well as shareholder / stakeholder . The GES score will determine if AAI qualifies as a "Best Workplace" category certification wherein the aggregated score >=85% ("Good to Great" arrival index)
2	Annualised Voluntary Attrition	%	Retaining talent and developing staff is key to creating a robust & performing organisation , the "Stay" , "Say" and "Strive" elements of engagement are inversely impacted if attrition levels are high . Benchmark on attrition for best in class organisation is voluntary attrition <=10% annualised
3	Staff Gender Ratios ( % F )	%	As a HRB Feminist organisation , gender diversity and equal representation of women contributing to the mission goes a long way in living our values and making a difference to our work space , though affirmative action is continuing until the end of Global strategy period (2017) , gender benchmark minimum is %F:%M :: 50% : 50% HR plays a pivotal role in creating an environment for this to happen through various OD
4	% Women in Leadership Roles	%	Feminist leadership value positioning and ensuring that women take on leadership roles to drive the organisations ' vision , normative benchmark is @ 50% women in leadership roles (SME , Line Managers , Heads of Unit , CDs and above roles)
5	% Completion of Performance Management Dockets	%	A performance and mutual accountability driven culture is best established through a robust PM process ensuring that all goals are set on time and aligned strategically , light touch review dialogues are completed on time , annual assessments and the 360 degrees feedback are used meaningfully to develop and build capability
6	% Staff Movement (Promotions one level up)	%	The ability to nurture talent and create opportunities for staff to take on higher level roles , bears testimony to a an evolved organisation in its talent and succession management journey and putting people first



# People Management Scorecard Rationale

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Sr.no	Key Measure	Unit Measure	Rationale
7	% of Women promoted (one level up)	%	This index keeps the feminist leadership and capability element on the radar and is applicable across all levels of staff , thus providing a traction for staff to aspire to take on higher level roles and augment their competencies
8	% Staff on Secondments	%	Career development opportunities that will help one operationalise the TMSP interventions , creating a learning and innovative organisation
9	% of staff on Dual Roles	%	Career development opportunities that will help one operationalise the TMSP interventions , creating a learning and innovative organisation
10	HR Audit Score (Numeral)	Numeric	The HR Audit score reveals the governance element of HR OD interventions , besides ensuring that hygiene elements of HR are running like a well oiled machine. Without a 'well controlled" HR function , fire fighting will become the norm to a reactive organisation . HR will continue to engage tactically and will not be able to strategically partner the mission
11	# of Employee Relations Incidents	Numeric	Clear reflections on walking your talk and value practise , if value practise is not aligned to the organisation's culture and vice versa , employee relations will be under pressure , adding to the high litigation and reputational risks besides adding to opportunity costs .
12	% Spend on staff training	%	Committed to developing organisational and staff capability , building esoteric skill sets and competencies that create a sector niche and both staff and organisation realise their full potential .
13	%-age of staff trained (% of total compliment)	%	Coverage versus leverage - Committed to developing organisational and staff capability , building esoteric skill sets and competencies that create a sector niche and both staff and organisation realise their full potential .



# Linking the Scorecard to Strategy

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Sr.no	Key Measure	Unit Measure	Score (%) December 2014	Points Range	Score June 2015 (%)	Points Range	Current Track (%) December 2015	Points Range2	Cumulative Average Points
1	Country Engagement Quotient Score	%	0.50	2	0.38	2	0.38	2	2.00
2	Annualised Voluntary Attrition	%	0.16	3	0.19	3	0.19	3	3.00
3	Staff Gender Ratios ( % F)	%	0.74	8	0.69	8	0.66	8	8.00
4	% Women in Leadership Roles	%	0.67	12	0.57	12	0.53	12	12.00
5	% Completion of Performance Management Doc	%	0.64	6	0.64	6	0.80	9	7.00
6	% Staff Movement (Promotions one level up)	%	0.08	8	0.02	4	0.02	4	5.33
7	% of Women promoted (one level up)	%	0.93	13	0.75	13	0.80	13	13.00
8	% Staff on Secondments	%	0.01	0	0.00	0	0.01	0	0.00
9	% of staff on Dual Roles	%	0.02	0	0.01	0	0.02	0	0.00
10	HR Audit Score (Numeral)	Numerical	3.50	9	3.50	9	3.10	9	9.00
11	# of Employee Relations Incidents	Numerical	0.00	10	0.00	10	0.00	10	10.00
12	% Spend on staff training	%	0.00	0	0.00	0	0.00	0	0.00
13	%-age of staff trained (% of total compliment)	%	0.36	2	0.38	2	0.25	0	1.33
				73		69		70	70.67

Remember to deliver on the strategy you must have your basics in place , monitor this through the HR Scorecard , which area/s needs more focus so as to help you deliver your strategy better (Arrival Points)



# Reflections @

Reference for future reading :

- **The HR Scorecard: Linking People Strategy, and Performance (with Brian Becker & Dave Ulrich),**
- **HRD Score Card 2500 - Based on HRD Audit , T V Rao**

