TOOL 1.5

Employee Scorecard

» **GOAL:** To gather staff perspectives on and empower staff to make changes to workplace gender issues. (Scorecards can be used to evaluate other issues, employees, or services, for instance, in the community.)

» **TARGET UNIT:** Human Resources

For more information on scorecards, please also see the IFC's new toolkit on community scorecards.

Scorecards (SC) are participatory monitoring mechanisms that can help companies to facilitate a participatory dialogue between staff and management. Scorecards are a process for gathering perspectives, as well as empowering participants to make suggestions for improvement and how to implement those suggestions.

Scorecards can be an effective tool in the private sector to help management and staff **better understand each other's perspectives and priorities**, and to develop collaborative, often low-cost solutions.

Scorecards were developed in the public sector to support dialogue between public service providers and users, but they can be an effective tool in the private sector to help management and staff better understand each other's perspectives and priorities, and to develop collaborative, often low-cost solutions.

In a private sector context, scorecards can:

- Give staff and management an opportunity to reflect on a given workplace issue
- Give staff and management an opportunity to identify what an improved workplace would look like, and ways to achieve those improvements
- Provide a forum for discussion and exchange between staff and management, and an opportunity to use this forum to agree on changes
- Provide a forum to monitor the extent to which changes have been implemented, and to assess and feedback on the change process
- Strengthen buy-in, transparency, communication, and accountability between staff and management

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What do Scorecards Involve?

Generally, the scorecard process involves a series of focus group discussions (FGDs) in which different groups discuss and evaluate a set topic (for instance, 'gender equality in the workplace') by discussing and identifying what good performance on this issue means to them, coming up with their own specific indicators, and then rating their workplace accordingly. Once a range of FGDs have been conducted, participants from different groups come together to compare and discuss findings and come up with a final agreed rating and plan for improvement.

Scorecards have traditionally taken place in person, but in 2020, the IFC began piloting virtual scorecards. This included a mix of virtual 'rooms'—including some participants who were able to gather in person, a remote facilitator, and some additional participants participating remotely from quarantine.

Scorecards are a good alternative to traditional surveys because they allow participants to define the metrics, rather than being limited to the questions being asked by assessors. Not only do they give management a more authentic view of what matters to employees, but they also invite participants to come up with solutions. This can lead to more innovative ideas, as well as inviting employee investment in implementing their own suggestions. Scorecards are meant to be an iterative process that gets repeated at six-month or yearly intervals to track improvements and make any necessary adjustments.

Scorecards can be conducted as a complement to a gender audit or independently. Where they are conducted in complement to a gender audit, it is recommended to do the gender audit first for several reasons. First, the information gathered from the gender audit can create jumping-off points for discussion and help facilitators work to address issues that surfaced during the audit. Secondly, scorecards bring up perceptions and allow staff to raise questions—some of which will require collaborative work to address, but others may reflect simpler information gaps. Conducting a gender audit first will give facilitators more data with which to answer questions and concerns, address issues related to information gaps, and redirect action planning towards more substantial issues.

Detailed Guidance on Implementing a Scorecard:

Below are detailed steps on implementing a scorecard. Additional resources providing detailed implementation guidance can be found at the end of the section. The following steps are adapted from World Bank guidance.

1. **Preparation:**
   a. Identification of facilitators: Trained facilitators are an important component of a successful scorecard. Facilitators may be external to the company, or internal

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facilitators may be trained. But it is important that facilitators are perceived to be impartial and able to conduct an objective and confidential (non-attribution of what happens within any focus group) scorecard process. Some companies may choose to have an external facilitator conduct the initial scorecard process, while simultaneously training internal facilitators for follow-up scorecards. To promote impartiality, internal facilitators should include both women and men, from both staff and management, working together for balanced facilitation.[48]

b. Identification of subject and scope: What will be the specific subject and scope of the scorecard exercise? It is important that the scope be clearly defined— too broad a mandate, and it will be difficult to narrow down criteria and recommendations. In the case of gender, a sample subject could be 'How to make [company name] a more gender equitable workplace?" This clearly defines the question around gender and limits the scope to questions related to workforce and workplace (rather than also including, for instance, issues of community engagement or procurement, which may have different stakeholders).

c. Select sample groups: Once the topic has been defined, identify key participant groups. In assessing gender equality in the workforce, for instance, it would be important to speak with both women and men, from all staff levels, to understand differences in perspectives at various levels and to get both men's and women's perspectives.

d. Preliminary information gathering: Facilitators should make sure that they have current, up-to-date information regarding gender equity policies and programs, and if possible, gender-disaggregated data on the current gender equity status within the company. Having this information at hand will help facilitating discussions.

e. Awareness raising: Facilitators should coordinate communication with staff to ensure that staff are aware and informed about the upcoming scorecard process.

2. **Focus Groups:**

a. For each focus group, facilitators will ask participants to discuss and evaluate the company (or selected aspect of the company—for instance, workplace) for the selected question. For instance, in the case of the workplace, facilitators would invite participants to have a focused discussion around what gender equality in the workplace means to them and how they define it. Participants will suggest criteria, and then vote to identify their five to eight most important criteria upon

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48 The IFC has developed several additional tools on how to ensure that training and learning programs are gender inclusive. For additional reading, please reference IFC, *Gender Supplement: Guide to Training: Setting the Standard for the Design, Delivery, and Evaluation of Learning Programs in Emerging Markets*, Washington, DC: IFC, 2020.

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which to evaluate the company. In the case of gender equality, for instance, sample criteria might include:

i. Availability of training opportunities

ii. Women's opinions are solicited and listened to

iii. Women's leadership is encouraged

iv. Women are promoted as often as men

b. Once criteria have been proposed and selected, participants evaluate how well the company is doing on each of these criteria, on a scale of 1 (Very Inadequate) to 5 (Very Good). For in-person scorecard exercises, participants can write their vote for each of the criteria on a slip of paper to maintain anonymity as to how individuals rated their employer. For virtual scorecards, facilitators may choose to have participants submit their votes through private chat messages or using a web-platform polling tool. Scores will be tabulated, and an average score for each criterion calculated.

c. Once scores have been identified for each criterion, facilitators should encourage a discussion about potential solutions or ways to improve each issue. Ideally, solutions should focus on low-cost solutions where feasible—for instance, identifying ways to change processes and policies, rather than big infrastructural actions like building new facilities. Of course, recommendations should reflect employee priorities and needs, but a range of suggestions, including lower and higher cost items, can increase the likelihood that employees and management can agree on a range of recommendations to implement.

d. Focus groups will be replicated among various employee groups and among management. Among management, the discussion—identifying criteria and voting on corporate performance—will serve as a reflection and evaluation of their own performance, as well as a broader discussion about the topic—for example, what makes a gender-equitable workplace.

FIGURE 1A | Sample Scorecard Focus Group Recording Template

Criteria	Scores					Strengths/ Weaknesses	Proposed Actions for Improvement
	5 V. Good	4 Good	3 OK	2 Inadequate	1 V. Inad.		
1. Training opportunities							
2. Encourage women's participation							

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3. **Exchange Meeting**

   a. Once both staff and management focus groups have been conducted, the next step is to bring together representatives from both sides. In an 'Exchange Meeting', representatives from each focus group should have the opportunity to present their criteria and ratings, as well as proposed recommendations.

   b. The Exchange Meeting discussion should lead to a final recommended action plan that can be agreed by representatives of both staff and management. A sample action plan is included below.

FIGURE 1B | Sample Scorecard Exchange Meeting Action Plan

Proposed Actions	Who should lead on making changes?	Who should support work on changes?
1. Promotions should consider job experience and positive work appraisals (not only educational degrees, formal certificates and qualifications, and interview skills).	HR	» Employee Union » Staff Association
2. More opportunities for training/study leave for women and for general staff.	HR	» Line managers » Women's Association » Employee Union women's representative
3. Assign tasks to allow women to prove leadership capacity.	Line managers Supervisors	» HR
4. Narrow salary gap between general and senior staff.	HR	» Employee Union » Legal Department
5. Review leave rotation arrangements (increased flexibility, shorter rotations).	HR	» Executive Committee » Employee Union

4. **Follow Up**

   Following the scorecard, it is key that clear lines of accountability and action are established to ensure that the recommendations are followed up and acted upon. Scorecards should be followed up at agreed intervals, for instance, every six months or year. The power of the scorecard is in the participant ownership and its ability to change corporate environment, as well as participant satisfaction by giving them a voice and stake in improvements. To capitalize on this, there needs to be clear and sufficient follow-up on the recommendations, as well as a follow-up scorecard to capture change over a prescribed period of time.

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