

Performance and Quality Improvement Annual Scorecard

Fiscal Year End

January 1, 2010 - December 31, 2010

Dept	Description	Freq	Standard	Target*	4th Q	3rd Q	2nd Q	1st Q	2009
Spiritual					12/31/2010	9/30/2010	6/30/2010	3/31/2010	12/31/2009
	Staff Growth	Weekly	# of staff Bible studies each week	1/wk	13	13	13	13	12
	Client Care	Weekly	# of clients prayed for (eff. 8/17/09)	100/wk	1300	1300	1300	1300	1205
Education	Workshop Frequency	Quarterly	# of CreditWise workshops per quarter	3	6	4	4	3	6
	Workshop Frequency	Quarterly	# of Homebuyer workshops scheduled per quarter	3	3	3	3	3	3
	Workshop Frequency	Quarterly	# of Educational Opportunities offered each quarter (begin 3Q 2010)	6	21	19			
	Attendance/Utilization	Quarterly	% of CreditWise workshops with greater than 5 participants (end 2Q 2010)	85%	n/a	n/a	100%	66.7%	100%
	Attendance/Utilization	Quarterly	# of CreditWise participants per quarter (begin 3Q 2010)	15	199	28			
	Attendance/Utilization	Quarterly	% of Homebuyer workshops with greater than 4 participants (end 2Q 2010)	75%	n/a	n/a	0%	0%	50.0%
	Attendance/Utilization	Quarterly	# of Homebuyer Workshop participants per quarter (begin 3Q 2010)	5	6	7			
	Attendance/Utilization***	Quarterly	# of Homebuyer workshops cancelled per quarter	0	0	0	0	0	1
	Client Outcomes	Quarterly	% of CreditWise post-test score averages over 70%	60%	76.47%	78.26%	58.06%	83.33%	90.24%
	Client Outcomes	Quarterly	% of Credit When Credit Is Due post-test score averages over 70% (3Q 2010)	60%	91.67%	95.24%			
	Client Outcomes	Quarterly	% of Money in Motion post-test score averages over 70%	60%	100.0%	97.2%	93.3%	90.0%	93.5%
	Client Satisfaction	Quarterly	% of overall positive satisfaction (education)	80%	99.44%	100.0%	100.0%	100.0%	100.0%
Client Outreach and Operations/Processing	Program Outcomes								
	Client Satisfaction	Quarterly	% of overall positive satisfaction	80%	99.67%	98.3%	99.7%	99.6%	97.2%
	Client Satisfaction	Quarterly	% of new client survey "YES" responses (counselor evaluation)	90%	94.6%	96.6%	94.6%	95.6%	94.4%
	Client Satisfaction	Quarterly	% of closed client positive satisfaction	80%	100%	100.0%	97.1%	100%	n/a
	Client Satisfaction	Quarterly	% of completed client positive satisfaction	90%	100%	100.0%	100.0%	100%	100%
	Peer/Utilization Review	Quarterly	% of files with 1 or fewer significant deficiencies	100%	100%	100.0%	100.0%	100%	100%
	Client Outcomes	Semi-Annual	% of closings that are completions	60%	81.7%	-	80.5%	-	70%
	Client Outcomes	Annual	Average length of plan for FLCs-originated clients (# months)	>27	33.94	-	-	-	31.3
	Client Participation	Quarterly	% of new DMP clients completing Money in Motion program (eff 8/1/09)	50%	41.18%	57.14%	57.69%	61.86%	51.67%
	Risk Management								
	Client Grievances***	Quarterly	# of reported client grievances	<5	0	1	2	0	1
	Incidents/Accidents	Quarterly	# of reported incidents/accidents	0	0	0	1	1	0
	Client File Availability	Quarterly	% of active client files available to counselors in hard-copy	100%	100%	100.0%	100%	100%	100%
	Client File Availability	Quarterly	% of client files available to counselors electronically (eff. 10/30/09)	100%	100%	100.0%	100%	100%	100%
	Compliance								
	Regulatory Reporting	Annual	% of state reporting deadlines met	100%	100%	100.0%	94.4%	100%	100%
	Regulatory Audits***	Annual	# of deficiencies or concerns reported in regulatory audits	<3	0	0	2	0	0
	Licensing	Annual	% of state licenses renewed/approved	100%	100%	100.0%	100%	100%	100%
	Creditor Reporting	Annual	% of creditor reporting deadlines met	100%	100%	100.0%	100%	100%	100%
	Creditor Reporting	Annual	% of major creditor Fair Share Rates maintained or increased	100%	100%	100.0%	100%	100%	100%
	Information Technology								
	Project Status	Semi-annual	% of project timelines met	80%	n/a	-	n/a	-	100%
	Information Security	Annual	# of annual information security tests performed	1	0	-	-	-	0
Employee Retention	Staff Retention	Semi-annual	% of staff retention agency-wide	90%	100.0%	100.0%	-	100%	100%
	Employee Satisfaction	Annual	% of employee satisfaction on annual surveys	90%	96.99%	-	-	-	99.6%
	Employee Harassment Grievances	Semi-annual	# of personal harassment grievances	0	0	-	0	-	0
	Staff Training	Quarterly	# of staff in-service trainings	1	0	1	1	1	0
	Staff Training	Quarterly	% of Counseling and Customer Service Staff with current certification	100%	100%	100.0%	100%	100%	100%
	Job Descriptions	Annual	% of staff positions with written and updated job descriptions	100%	100%	100.0%	100%	100%	100%
Physical Location	Monthly Safety Inspections***	Monthly	# of deficiencies found	<2	0	0	0	1	0
	Project Status	Semi-annual	% of project timeframes met	80%	n/a	n/a	n/a	n/a	n/a
	Facility Use Agreement	Annual	% of organizations using facilities with completed facility use agreement	100%	n/a	n/a	n/a	n/a	n/a
Financial Stability	Annual Budget	Semi-annual	% good to budget	100%	29.5%	-	113.6%	-	132.2%
	Liquidity	Semi-annual	# of days of cash on hand (beg. 2010)	90	236.39	-	233.28	-	-
	Short Term Debt	Semi-annual	\$ amount of credit card balance not paid off in full each month	\$0	\$0	-	\$0	-	\$0
	Creditor Revenue***	Annual	% of net revenue to total revenue (2010 is yr 3 of HR4)	60%	43.15%	-	-	-	37.50%
Benevolence	Staff Giving	Annual	\$ per FT staff provided by org for charitable giving (pay it forward)	\$500	\$500	-	-	-	\$500
	Staff Giving	Annual	\$ per PT staff provided by org for charitable giving (pay it forward)	\$250	\$250	-	-	-	\$250
	Charitable Ministry Support	Annual	% of revenue over expenses gifted for charitable purposes (beg. 2010)	10%	45.97%	-	-	-	-
*Target - A MINIMUM PERFORMANCE STANDARD; below target indicates risk (yellow or red), with exceptions marked by *** where below target is a positive performance									
**Actual Ratings Key:									
GREEN	Green is at or above target and indicates an acceptable or good performance (except for thos marked *** in which above target is an at risk performance)								
YELLOW	Heightened Administrative Watch								
RED	Administrative Review, Improvement Action Plan May Be Warranted								