

Guidelines for Interpreting and Scoring Benchmarks

11.4: *Human resources policies ensure that institutional planning includes investment in personnel growth, health care and retirement.*

I. What does this benchmark indicate for school performance?

Benchmark 11.4 is focused on school and diocesan policies that direct decision makers to focus on personnel issues when designing and adopting institutional level plans. School wide plans (long and short term) should include clearly delineated investment strategies for personnel growth, health care and retirement for all employees.

II. As a review team member, what evidence do I look for?

The Board, the leadership team and outside reviewers should seek out the following:

- Are there planning documents, which include sections on personnel?
- Do documents specifically delineate plans for succession planning and personnel growth, both capacity building for current staff and expansion plans for new staff?
- Is health care addressed with clear options that reflect principals of catholic social justice and the need for insurance options for all?
- What is the retirement policy? How is the long-term support of the plan explained?
- Do the documents indicate how these plans will be funded and supported?
- If this information exists is it widely shared?

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III. What are the key differences between the levels of the rubric?

At level **3-Fully meets Benchmark,**

policy, planning and budget documents demonstrate the policies, intentional plans and budget allocations to support the capacity enhancement of current staff, with professional development, and the possible expansion of staff for growth as well as clear policies and guidelines for health care benefits and retirement benefits as well as costs associated with those benefits.

At level **4-Exceeds Benchmark,**

based on the policies, the budget allocations and health programming is integrated and clearly part of the salary and benefits package provided as total compensation for all employees. There is review of these packages and benchmarked data regarding health care plans, health and life insurance programs and retirement options are collected from benchmarked entities and used to evaluate the plans and inform adjustments when necessary. This information is freely shared with all employees.

At level **2-Partially Meets Benchmark,**

there is evidence of human resource policies at either the diocesan or school level. The policies apply to only one or two of the areas cited and are not fully budgeted or supported with staff for adoption and implementation.

At level **1-Does Not Meet Benchmark,**

There are no HR policies at either the diocesan or school levels related to these wellness areas (personnel growth, health care and retirement). If there are policies they have not been adopted or implemented.

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IV. What are some key suggestions for improvement?

To move from level 1 to level 2,

- Develop human resource policies for personnel, including growth and expansion, health plans and programming and retirement at school level.
- Adapt and adopt for the school diocesan policies (if diocesan policies do exist) and begin implementing.

To move from level 2 to level 3,

- Fully adopt policies that exist at either the diocesan or school level.
- Assure the successful implementation by securing the budget lines to fund the programs.
- Staff to administer, maintain database and evaluate the program.

To move from level 3 to 4,

- Develop compensation packages for all levels of employees.
- Share all professional development options for all staff.
- Compare and evaluate all practices in these areas, with other school systems, Catholic schools, other dioceses or comparable non-profit organizations.
- Share information with all employees, highlighting the full cost of staff compensation packages and the total percentage of school's cost associated with packages.
- Retirement options should be carefully delineated to include definitions and explanations of such things as, but not limited to: retirement funding (401K or 403 B etc.) pensions, early retirement, severance pay, investment funding, and other terms.

V. What are key terms for common understanding? (Refer to NSBECS Glossary for terms listed below.)

Human resources programs
Human resource policies
Health care programs – market definitions
Retirement plan
Personnel growth