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BALANCED SCORECARD IN EDUCATION



**AKS-LABS**

Balanced Scorecard in Education - Best Practices Report  
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Universities all over the World use the Balanced Scorecard concept. They apply the concept to:

- Internal processes;
- Students scoring;
- Educational purposes;

Our customers from educational industry use BSC Designer as a software tool to demonstrate the Balanced Scorecard concept in action to their students.

As an effort to help educational professions understand the Balanced Scorecard concept better, we decided to analyze the best practices of how the Balanced Scorecard concept is implemented by universities and business school.

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## UW Prepares for Emergency With a Balanced Scorecard

The University of Washington Facilities Services (UW) built its balanced scorecard to measure the efficiency of the university's Emergency Management Strategy. Using the balanced scorecard, UW evaluates how effectively it is using its resources to prepare for a possible disaster and how well it provides service in the event of an emergency.

UW's strategy map identifies three primary goals for its Emergency Management balanced scorecard:

1. Establish a strong resource foundation
2. Deliver the best services and performance
3. Serve the university and the community

By tracking appropriate Key Performance Indicators (KPIs) in each of these three objectives, UW's goal is to develop a plan to reduce the impact of disasters on the university. UW also hopes to provide a structure that other universities can adopt to improve their emergency preparedness.

UW publishes its balanced scorecard results on the university website so stakeholders can view the unit's progress. Of the 16 KPIs defined in the UW balanced scorecard, only one measure did not perform at or near the target value. Some KPI values indicate that UW significantly exceeded its performance goals, such as Deliver Service (+7%), Current Processes Improved (+5.5 points), and Number of New UW Alert System Members (+260%).

UW Facilities Services created a balanced scorecard to ensure that it could serve the university and the community effectively during an emergency. To see UW's balanced scorecard and review results, see [www.washington.edu](http://www.washington.edu).

## UCSD Balanced Scorecard Ensures Value Its Community

The University of California San Diego (UCSD) holds the distinction of being the first university to implement a balanced scorecard for improving performance and tracking progress toward its goals. With nearly 20 years of experience with the balanced scorecard system, UCSD has proven that the balanced scorecard is an effective method of university performance measurement.

In addition to the typical financial, operations and customer service perspectives, UCSD's balanced scorecard uses the Innovation and Learning perspective to focus on the overall well-being of university employees. All types of university employees are represented, from accounting to transportation services.

Key Performance Indicators (KPIs) for the Innovation and Learning perspective are comprised of university staff members' perception of the school as a workplace. KPIs such as Good Use of Skills allow employees to indicate whether their talents are effectively allocated, while others like Feel Valued show how well management is communicating with employees.

Typical perspectives have also been well-developed in UCSD's balanced scorecard. Student satisfaction with all areas of university operations are quantified and measured. Internal



process data and financial information have carefully defined KPIs for accurate analysis. Results are neatly organized into charts and graphs for easy review.

Since 1993, UCSD has been using its balanced scorecard to effectively measure performance results and evaluate progress toward university goals. Visit [UCSD's website \(http://www.ucsd.edu/\)](http://www.ucsd.edu/) to learn more about this pioneer project in the balanced scorecard's use for education administration.

### **UVM Balanced Scorecard Improves Finance Management**

The University of Vermont Division of Finance and Enterprise Services (UVM Finance) has recently completed development of a balanced scorecard. This implementation will ensure that the unit's strategies contribute to the university's overall success.

The balanced scorecard development project, which was scheduled for completion in late 2010, focuses on areas of resource management and service quality. These strategic themes will enable the unit to achieve its ultimate goal of supporting the university's academic objectives.

UVM Finance identified sixteen strategic objectives to achieve these long-term goals. The development committee then selected nine of these objectives as high-priority targets for the 2011 fiscal year.

Senior Leaders assigned to each objective were responsible for developing those Key Performance Indicators (KPIs) which effectively represent progress toward the objective. By identifying and empowering the UVM Finance leaders best qualified to evaluate each objective's KPIs, UVM has ensured that the defined metrics will be both accurate and realistic.

Data collection is scheduled to begin during the 2011 fiscal year and the initial balanced scorecard results will be presented on a regular basis to university leadership and stakeholders. UVM Finance may also publish an annual report on its progress with the balanced scorecard system to promote transparency.

Visit [UVM's website \(http://www.uvm.edu/\)](http://www.uvm.edu/) to learn more at the school and follow its use of its newly developed balanced scorecard system.

### **Baldrige Criteria Make University Balanced Scorecards Effective**

According to a study published by Southeast Missouri State University (SEMO), the Baldrige Education Criteria for Performance Excellence (BECPE) can provide significant improvements to university performance results when used to develop a balanced scorecard.

The BECPE fall into seven categories: Leadership, Strategic Planning, Students/Stakeholders, Analysis, Staff, Process Management, and Performance Results. By choosing Key Performance Indicators (KPIs) in each these categories to build a balanced scorecard, a university can create a comprehensive strategy map for growth management.

Unlike business structures, internal efficiency plays a much greater role in university success than external sales or distribution efforts. The BECPE balanced scorecard uses KPIs weighted to reflect the importance of procedural effectiveness.



The BECPE model also includes KPIs for ethical standards and public perception. For universities, a positive public opinion of the university impacts everything from enrollment numbers to collaborative research invitations. Data from both voluntary surveys and program results can be quantified in a balanced scorecard to help evaluate the success of the university's public relations efforts.

By developing a balanced scorecard using the BECPE, leading universities can ensure that all aspects of university management are represented. [Read the full report here \(http://isofian.files.wordpress.com/2007/02/applying-bsc-in-education.pdf\)](http://isofian.files.wordpress.com/2007/02/applying-bsc-in-education.pdf) . You can also visit [SEMO's website \(http://www.semo.edu/\)](http://www.semo.edu/) to learn more.

### UAA IT Services Balanced Scorecard Creates IT Success

The University of Alaska Anchorage IT Services (UAA IT) has implemented a balanced scorecard to evaluate the university unit's performance and progress toward its goals. UAA IT decided to adopt the balanced scorecard system to create a measure of accountability and strategic planning in the university comparable to that seen in the private business sector.

For each of the standard balanced scorecard perspectives — Financial, Customer, Internal Processes, and Learning and Growth — UAA IT has identified two Key Performance Indicators (KPIs) for tracking activities. The KPIs quantify on how well UAA IT is managing university resources and how satisfied users are with the services provided.

UAA IT has also developed an interactive website where all visitors can view the department's balanced scorecard and see current performance values. Each perspective's two KPIs are represented on gauges with a green, yellow and red area. Current values are indicated with a moving pointer on the gauge, allowing any visitor to see in which areas UAA IT is meeting its performance goals and which areas are falling short. Visitors can also click on the gauges to bring up additional charts for more detailed analysis.

UAA IT Services uses a balanced scorecard to meet service and resource goals in the university's technology management program. View the UAA IT interactive balanced scorecard at [www.uaa.alaska.edu](http://www.uaa.alaska.edu).

### Wayne State Implements New IT Balanced Scorecard

Wayne State University (Wayne State) recently released its first results from its recently-implemented Computer and IT Services (C&IT) balanced scorecard. The scorecard uses both historical data and current survey results for analysis of the unit's performance over the past two years.

The purpose of Wayne State's C&IT balanced scorecard is to provide a realistic, reviewable measurement of the level of IT service the unit is providing to students, faculty, staff and community members. By collecting monthly survey results from IT service users, C&IT can quantify factors such as user perception to accurately determine those performance areas that need additional attention.

Key Performance Indicators (KPIs) include items such as system availability, timeliness of responses to service requests, and customer satisfaction levels. A target value is set for each KPI that requires a specific number of positive evaluations on surveys.



Wayne State C&IT has published its results in four strategic areas, as well as an overall performance review. To make the balanced scorecard results easy to analyze, charts and graphs represent the target values and performance results. Analysis criteria is provided with each chart and additional historical data can be accessed as well.

See Wayne State C&IT's performance results and learn more about its balanced scorecard information at the Wayne State website (<http://wayne.edu/>).

### **UVa Library Balanced Scorecard Improves Collection Management**

For almost a decade, the University of Virginia (UVA) Library has been using a balanced scorecard to promote growth and effective management of the library's collection and resources. The UVA Library's unique application demonstrates the flexibility of a well-developed balanced scorecard system.

The UVA Library's primary objectives include a high student and faculty satisfaction rate, efficient use of library resources, adequate growth to meet university needs, and excellent staff performance. UVA Library chose metrics that best represented factors involved in a successful academic library operation. Key Performance Indicators (KPIs) include items such as turnaround times, collection preservation, unrestricted donations, and staff diversity.

In 2002, the initial year of balanced scorecard data, the library recorded less than a 50% success rate for nearly all areas identified as essential for the strategic success. However, in the years since the balanced scorecard was implemented, the library has shown a steady increase in target achievement results. Nearly all areas tracked on the balanced scorecard show improvement by the 2009 operational year; the Internal Processes perspective has more than doubled its successful performance rate.

The UVA Library is an excellent example of a balanced scorecard implementation in an academic environment. To learn more, visit the UVA Library website (<http://lib.virginia.edu/>).

### **MO SBTDC Trains Small Businesses In Balanced Scorecard Use**

The Missouri Small Business and Technology Development Centers (MO SBTDC) organization has developed a training program to help small business owners and managers develop and implement an effective balanced scorecard.

The MO SBTDC program is divided into three 2-hour sessions, each focusing on a particular part of the nine-step development process. In the first session, business owners and managers define their companies' strategic goals, then start selecting the measurements for Key Performance Indicators (KPIs).

In the second session, course students will evaluate the selected goals to determine which are critical for the success of the business. After the critical objectives have been defined in Sessions 1 and 2, Session 3 provides business owners with examples of suggested methods for implementing KPIs in a balanced scorecard to achieve the identified goals.

MO SBTDC also offers free documentation online to help small businesses learn more about the balanced scorecard concept and its use in measuring business performance and growth. A



Recommended Reading list suggests other expert sources where business owners can obtain additional information and guidance.

The MO SBTDC balanced scorecard program helps small business owners take advantage of this proven performance management system. To review the course outline and find free balanced scorecard information, visit the MO SBTDC website at [www.missouribusiness.net](http://www.missouribusiness.net).

### University of Akron Balanced Scorecard Is Charting the Course

The University of Akron (Akron) uses its balanced scorecard to further the university's goal to be recognized as a leading public research institution. The university's balanced scorecard initiative, named "Charting the Course," was developed to assist the school in defining and reaching leadership goals.

Akron's balanced scorecard is designed to help it reach its primary objective of establishing the school as a leader in public research. In support of this main goal, an enhanced student experience, nationally recognized academic activities, and effective use of university resources also play essential roles.

Akron devised a strategy map which organizes the steps necessary to achieve these objectives. Key strategies such as campus enhancements and market positioning were outlined and desired results were defined. Once the strategy map was completed, Key Performance Indicators (KPIs) were chosen to effectively represent the university's progress toward these strategic goals.

The KPIs used in Akron's balanced scorecard are divided into four essential categories: Discovery and Innovation, Cultural Enrichment, Community Well-Being and Economic Development. The university's balanced scorecard combines data collected from surveys, research results and financial figures to present an accurate representation of Akron's performance.

The University of Akron's "Charting the Course" initiative helps the school accurately evaluate its progress toward its goal of public research prominence in northern Ohio. Read more about the University of Akron's efforts at [www.uakron.edu](http://www.uakron.edu).

### Rutgers Forum Report Supports Balanced Scorecard in Education

Education Excellence Indicators go beyond traditional financial and operational measurements to create a broader, more proactive view of growth in higher education institutions. By quantifying important factors such as course effectiveness and university perception, the balanced scorecard can accurately present the institution's progress toward its goals. Traditional higher education indicators focus primarily on student enrollment numbers and staff workload. While these areas are important, they don't provide a complete picture of the institution's performance because they emphasize what has already been achieved rather than on university objectives.

Excellence Indicators are used build a balanced scorecard that takes a longer view of a university's success. In this system, the Key Performance Indicators (KPIs) fall into five categories: Teaching/Learning, Service/Outreach, Scholarship/Research, Workplace Satisfaction and Financial.





Traditionally, Teaching and Learning indicators are often quantified using a basic count-and-tally of the number of courses and enrolled students. Instead, the Excellence Indicator system evaluates the effectiveness of the courses based on evaluations of faculty peers and students. Faculty peers can complete surveys that rate the quality of the course structures or instructor expertise; students can rate the instructor's methods or the usefulness of the curriculum. These ratings are weighted and summarized in the balanced scorecard to provide an understanding of how well the university's academic structure is translating to student success.

Service and Outreach Excellence Indicators deal with the university's units' perceptions and contributions to external members of the community. For example, the level of alumni involvement in the school's programs, including donations and event attendance, is a strong indication of how satisfied past students were with their university experience. The number of faculty invitations to participate in dissertation committees can establish the university's reputation as a strong academic influence. A positive university image impacts how well the university can attract promising students and notable faculty, which are both essential factors in university performance.

The related Excellence Indicator area, Scholarship and Research, also defines how the university is perceived by the academic community as a whole. Frequent article and paper publications in prominent academic journals indicate that the university's faculty members are well-respected in their respective fields. The level of research funding obtained offers a view of how knowledgeable external sources consider the school's researchers.

Workplace Satisfaction Excellence Indicators include employees' perception of the university, including the level of compensation, staff morale and the overall climate. Satisfaction with the university plays a significant role in both retaining existing faculty and attracting new faculty members.

Finally, Financial Excellence Indicators quantify the flow of funds into the university, out of the university and between operating units. These KPIs can be established at both individual unit level and at the university level.

The primary goal of this Excellence Indicator structure for the balanced scorecard is to increase the school's performance as a preferred education institution for promising students and leading minds in academic faculty. By maintaining an accurate measurement of progress toward strategic objectives while also meeting financial and enrollment goals, universities can create a responsible strategy for continue success.

Visit [Wisconsin University](#) or [Rutgers University](#) to learn more about research on balanced scorecards in academic environments. To read the full Rutgers Higher Education Forum report, click [here](#)

(<http://oqi.wisc.edu/resourcelibrary/uploads/resources/Balanced%20Scorecard%20in%20Higher%20Education.pdf>) .





## Romania Education Uses Innovative Balanced Scorecard Planning

A Romanian higher education research consortium has begun the process of developing and implementing a balanced scorecard to increase the quality of the national public higher education system. This complex research, planning and implementation program will assist the organization in determining the best structure for its balanced scorecard system.

The program is divided into three objectives. Each objective will perform a key function as the consortium develops a balanced scorecard designed to enhance the Romanian education experience.

### **Objective 1: Analyze the effectiveness of the balanced scorecard in existing higher education implementations.**

In the first part of this project, the Romanian research consortium will review how the balanced scorecard is being used in other public higher education systems around the world. Researchers will review other institutions' overall management strategy, including quality goals, financials, and operational procedures. Once the consortium gains a clear understanding of each subject's program, the researchers will then evaluate how the balanced scorecard system has improved each higher education institution's ability to meet its objectives.

### **Objective 2: Evaluate the benefit that a balanced scorecard system would provide to the Romanian public higher education system.**

This objective focuses on evaluating the scorecard's use in the Romanian education structure. The results obtained in Objective 1 will be distributed by website, presentation, papers and academic journal publications. Education administrators will be encouraged to review the research results and provide feedback on the project.

After administrators have had an opportunity to evaluate the balanced scorecard program, the consortium will then collect the administrators' responses by survey and focus group. If research indicates that a balanced scorecard could be used effectively to improve Romanian public higher education, the researchers will then create practical theories and evaluate the expected results in each.

### **Objective 3: Develop a balanced scorecard model and test it in major Romanian university environments**

In the third portion of the research project, the consortium will work with four major Romanian universities to develop a balanced scorecard for test implementation. A customized strategy map will be designed for each school, and Key Performance Indicators (KPIs) will be identified. Target values will be established and the balanced scorecard will be constructed. Potential users will then review the strategy map and KPIs for accuracy and usefulness in public higher education management.

Finally, a few key Romanian universities will be selected as pilot institutions to implement and test the balanced scorecard system in actual use. Each university will provide feedback on its areas of success or difficulty, and the consortium will compare results to determine which balanced scorecards were most effective. Using these pilot implementations, the consortium



will then develop a standard balanced scorecard for use by the administration in all of Romania's public higher education institutions.

Romania's three-part program for evaluating and implementing a balanced scorecard helps ensure success in this national education initiative. By carefully establishing the program's goals and preparing a structured plan for implementation, the Romania consortium will ensure that every school gets the most benefit from this innovative university management program.

To read the full report on Romanian's innovative national public education balanced scorecard program, click [here](http://www.highbeam.com/doc/1G1-182924524.html) (<http://www.highbeam.com/doc/1G1-182924524.html>).

### Excellence Indicators Create an Effective Balanced Scorecard

Use of a well-developed balanced scorecard can significantly improve the success of a university, according to research published in the Rutgers University Higher Education Forum. By including "excellence indicators" rather than simply traditional Key Performance Indicators (KPIs), universities can effectively use the balanced scorecard method to improve student performance and university results.

Traditional KPIs include factors such as graduation rates, length of time for degree, post-graduate job placement and staff-to-student ratios. Instead, a more balanced scorecard would include excellence indicators in five broad categories. Teaching/Learning indicators focus on the value of the curriculum, the quality of the educators and the level of student satisfaction. Service/Outreach metrics would evaluate university's popularity as a partner in major projects and the level of alumni involvement. Scholarship/Research KPIs express the university's success as a source of quality scholarly work and research. Workplace satisfaction and financial indicators measure how well the university is using its human and capital resources.

By implementing a balanced scorecard that includes these excellence indicators, universities can get a more comprehensive understanding of the school's growth. The university can effectively reach objectives by evaluating those activities that increase the attractiveness of the university and improve its standing in the higher education community. Click [here](http://oqi.wisc.edu/resourceibrary/uploads/resources/Balanced%20Scorecard%20in%20High%20Education.pdf) (<http://oqi.wisc.edu/resourceibrary/uploads/resources/Balanced%20Scorecard%20in%20High%20Education.pdf>) to read the full report. Visit [Wisconsin University](#) or [Rutgers University](#) to learn more about these schools' implementation of the balanced scorecard concept.

### Balanced Scorecard Helps Georgia School District Meet Goals

Superintendent Scott Cowart decided to implement a balanced scorecard for the Monroe County, Georgia school district after receiving poor ratings from the state education board. Monroe County uses its balanced scorecard to accurately evaluate whether schools are meeting goals needed to effectively contribute to the district's education objectives.

School progress is traditionally tracked using standardized test scores and graduation rates. However, when the Monroe County school system began to fall short of expectations, the district developed a broader array of Key Performance Indicators (KPIs) to better identify areas that were contributing to poor student performance. District-provided functions, such as the school meal program and transportation, were also included on the district's balanced scorecard.



A red-yellow-green color coding method allows board members and administrators to quickly identify areas that need attention. The superintendent and the school board have the information needed to hold principals accountable when progress goals are not met.

Monroe County's balanced scorecard has also increased the transparency of the school's improvement efforts and built trust among community members. The school publishes the balanced scorecard weekly so parents, teachers, administrators and community leaders can view current results.

The Monroe County school district's balanced scorecard combines academic goals and operational goals to ensure that each child receives the best possible education. Read the full report at the American Association of School Administrators' website (<http://www.aasa.org/>).

### Cal Poly Uses Balanced Scorecard to Enhance PR Strategies

The University of California Polytechnic Institute (Cal Poly) combines the balanced scorecard with traditional management methods to more accurately represent the success of public relations (PR) activities. By defining metrics to evaluate the intangibles, Cal Poly is able to effectively determine whether PR efforts are contributing to the school's growth and success.

Cal Poly uses the balanced scorecard as a way to quantify the relationships between current public relations activities and long-term objectives. Metrics for PR processes and strategies are defined in relationship to university objectives, creating a clear picture how day-to-day PR efforts support the goals of the university as a whole.

The balanced scorecard also benefits Cal Poly communication flow between senior and junior level management and between diverse departments in the university. The scorecard quantifies and summarizes important data, which facilitates cooperation between departments to resolve issues and enhance university activities.

Cal Poly PR directors also use the balanced scorecard to help justify budgetary needs. The scorecard provides concrete data to support changes to budget and explain the need for expenditures. It also helps demonstrate to senior management the value that the PR activities create for the institution.

Cal Poly Public Relations Department uses the balanced scorecard to ensure that all members of the staff work together effectively to achieve the goals of the university. To learn more, visit [www.csupomona.edu](http://www.csupomona.edu).

### Romanian Higher Education Considering Balanced Scorecard

Romania has begun a three-year project to implement a balanced scorecard for modernization of its public higher education system. Using the balanced scorecard, Romanian universities will be able to evaluate management practices, improve resource stewardship, and increase the performance results.

Educators decided to research the balanced scorecard after witnessing its success in Romania's private sector. However, this project extends beyond using a scorecard to increase financial and operational accountability. Researchers will develop a mission-focused balanced scorecard that reflects universities' goal of providing an exceptional higher education experience to students.



The project is divided into three objectives. In the first objective, the use of the balanced scorecard is evaluated in the international private sector. The second objective studies its potential effectiveness in the Romanian higher education structure. The third objective includes initial design of the scorecard and testing in four of Romania's major universities. Major components of the scorecard will be academic excellence, the student learning experience, diversity, outreach and resource management.

Successful implementation of the balanced scorecard in Romania's 56 higher education institutions will have far-reaching impacts. Public education leaders anticipate both improvement in performance results of institutions and increased opportunity for international collaboration and recognition. Learn more in <http://www.highbeam.com/doc/1G1-182924524.html>

### Balanced Scorecard Improves Service at CSU

The California State University (CSU) Business and Finance Division depends on its balanced scorecard to evaluate everything from effective leadership to progressive technology use. Key Performance Indicators (KPIs) help CSU determine the university's progress toward its goal of providing top-quality service to CSU students, alumni and external partners.

The university collects data through sources such as financial records and surveys. This data is entered to the balanced scorecard, which uses defined metrics to calculate the level of effective resource management and customer service in relation to university objectives.

Among customer service KPIs, CSU indicators include items such as cafeteria menu selection, parking lot conditions and visibility of security staff. Financial KPIs include, among others, on-time payments, procurements and even staff courtesy. Budgeting, capital construction and information technology are also tracked.

Additionally, CSU uses its balanced scorecard to determine how external partners view the university's responsiveness to issues. Indicators on outside sources' approval of problem resolution methods and communication efforts help the school know which areas need improvement.

Using these diverse KPIs, CSU has created a balanced scorecard that accurately represents the university's progress toward key objectives. It provides the Business and Finance Division with the information to take a leadership role in guiding the university toward continued growth and success. Go to [www.calstate.edu](http://www.calstate.edu) to learn more about CSU.

### UC Berkeley Emphasizes Teamwork with Balanced Scorecard

University of California Berkeley's "Our Balanced Scorecard" initiative, introduced in Business and Administration Services in 1999, uses staff input to develop a balanced scorecard which emphasizes effective use of resources and processes. Each business unit determines its critical objectives, then defines the metrics that will best represent the unit's progress. This "staff-defined" implementation allows the school's decision makers to effectively work together create a comprehensive balanced scorecard.

For example, Berkeley's customer service unit emphasizes the use of the school's assets, such as expert personnel, excellent facilities and well-defined processes, to improve the quality of



the services that the school provides. The balanced scorecard quantifies KPIs by calculating the relationships between positive customer survey results and service operating costs.

Berkeley's balanced scorecard also tracks the university's process improvements using Lean Principles and Six Sigma methodologies. KPI calculations provide a way for administrators to quantify the success of various procedural initiatives and determine whether objectives will be met on the desired schedule. The scorecard also provides detailed analysis of productivity and highlights areas that need improvement to reach important goals.

University of California Berkeley combines the balanced scorecard with established management principles to create a comprehensive growth plan. The balanced scorecard provides administrators with concrete data to ensure that the school is making adequate progress toward its objectives. To learn more about UC Berkeley, visit <http://berkeley.edu/>

### UCSF Uses a Balanced Scorecard to Enrich Campus Life

The University of California San Francisco (UCSF) campus has stepped beyond the typical administrative use of the balanced scorecard to create a scorecard for enhancing the campus life of UCSF students. UCSF implemented the balanced scorecard in Campus Life Services (CLS) to help achieve its goal of attracting the most promising health profession students to the university.

CLS objectives included high-quality customer service, innovative services, integrity and diversity. However, UCSF realized that lack of usable measurements made it difficult to determine whether the university was making adequate strategic progress toward the standards it desired. The balanced scorecard provides an effective method for CLS to evaluate performance and update its strategies when needed.

To implement the balanced scorecard, CLS defined metrics for financial, customer, internal process and innovation/learning areas. Appropriate benchmarks were also determined to allow UCSF to compare its product with that of its competitors' and analyze success rates. CLS inputs relevant data from surveys, reports, financials and other sources, then reviews the balanced scorecard quarterly and annually to determine whether strategic actions are effective in achieving CLS goals.

UCSF's Campus Life Services uses its balanced scorecard to help it effectively attract and retain talented, motivated students. For more info, click [www.ucsf.edu](http://www.ucsf.edu).

### Penn State Balanced Scorecard Coordinates Strategy Effectively

Pennsylvania State University's Center for Quality and Planning developed its balanced scorecard as way to better coordinate planning activities with operational units. By combining a well-developed strategy map and a carefully created balanced scorecard, Penn State is able to eliminated wasted effort by ensuring every action contributes to the university's success.

Strategy mapping is an important part of Penn State's implementation of the balanced scorecard system. By organizing university goals and strategies visually, managers are able to easily understand the relationships between activities and the objectives to which they contribute. Additionally, the strategy map also helps decision makers choose the best metrics.



The balanced scorecard provides managers and senior leaders with the information needed to analyze the university's progress toward the objectives defined in the strategy map. Penn State also uses the balanced scorecard to assess whether operational units are performing at the level needed to reach university objectives on schedule. Financial, time and satisfaction KPIs present an accurate picture of how well planning functions are translated to front-line activities such as streamlining efforts, cost savings initiatives, and customer service improvements.

Penn State's balanced scorecard allows the university to ensure that planning and operations are always working toward the same goals. To learn more, visit [www.psu.edu](http://www.psu.edu).

### Carleton University Balanced Scorecard Improves Operations

Carleton University in Ottawa, Canada implemented a balanced scorecard in its Finance and Administration department. Using a detailed balanced scorecard, Carleton is able to effectively track and manage Key Performance Indicators (KPIs) in customer service, university resource management, process improvements and human resource efforts. Among its twenty-five indicators are student satisfaction and safety, financial operating results, benchmarking and employee turnover.

In the 2008-2009 school year, Carleton was able to provide a review of the actual progress toward its objectives based on the KPIs structured into its balanced scorecard. Over 85% of university departments showed improvement in customer service. The school was also able to quantify its progress toward benchmarking initiatives, with some projects at 77% completion at the end of the fiscal year. Improvements to strategic and operational procedures were also identified, with desired changes at 67% to 100% completion.

Carleton University's implementation of the balanced scorecard concept provides an excellent example of how accurate tracking of KPIs help universities quantify important objectives and relativistically evaluate progress toward those goals. Rather than relying on subjective interpretation of the university's progress, Carleton can clearly, objectively define where goals are on target and where additional effort is needed. Check details (<http://carleton.ca/>) about Carleton University and its balanced scorecard implementation.

### Atlanta Public Schools Succeed Using Balanced Scorecard

Before implementing its balanced scorecard, the Atlanta public school district was an example of everything that goes wrong in urban public schools: low student success rates, poor attendance, lack of qualified staff and antiquated, deteriorating buildings. However, just ten years after it implemented a balanced scorecard, Atlanta Public Schools has become an example of an outstanding urban education system.

While Atlanta Public Schools had always identified strategic goals for improvement, the balanced scorecard made those goals attainable by quantifying progress and providing realistic measurements of results. The scorecard also allowed administrators to identify areas where departments could better coordinate efforts to help students succeed.

In its balanced scorecard implementation, the Atlanta school system defines its strategic goals, then selects one or two metrics to measure progress. Targets for these Key Performance Indicators (KPIs) are defined and strategic measures are scheduled and funded.



Administrators and educators have embraced the balanced scorecard system in the Atlanta Public School district. People enjoy submitting their data and reviewing the balanced scorecard to see where their efforts have been successful and where targets were not achieved.

The Atlanta Public School district used its balanced scorecard to turn a failing school district into a model education system. To learn more about the Atlanta schools' use of the balanced scorecard, see the article on the [American Association of School Administrators](http://www.aasa.org/) (<http://www.aasa.org/>) website.