



Learning about Recent Team Improvement Initiatives-Berks Strategic Plan Scorecard




CELEBRATING 50 YEARS 1958-2008

Building on 50 years of excellence



PENN STATE BERKS 2008-2013 STRATEGIC PLAN

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Scorecard 101:

Scorecard¹-

- Translates mission & goals into measureable outcomes
- Articulates and makes visible the status of those outcomes
- Provides a framework to communicate progress
- Purpose is to channel efforts to those goals that need attention while affirming talent and ability of the organization



¹ Kaplan, R.S, & Norton, D. P. (1996). *The balanced scorecard*. Boston, MA: Harvard Business School Press.

How did we get started?

Background

- Penn State Berks is fairly **typical** in the **development** and the **implementation** of its strategic plan
- In 2009, the Strategic Plan Council (SPC) was **nominated as a CQI team. Nomination was a result of**
 - SPC hard work & persistence
 - Development and use of Strategic Plan Scorecard
 - Subsequent activities, budgeting, priorities set by results of scorecard

How did we get started? A scorecard was developed because...

- Each action step has a **measurable outcome** or strategic indicator
- The scorecard shows the extent of the progress of each **action step**, and there is many action steps (ex. Year 1: 38, Year 2: 27)
- **Keeps track** of the corresponding activities associated with each action step
- In essence, the scorecard is a **quick** and **easy summary** that tracks the progress a a 60 page strategic plan

How did we approach the project? Logistics

- Scorecard comprises of action steps by **year**
- The *Strategic Plan Advocates* are responsible for updating the scorecard
- Updated **five** times in an academic year
- Disseminated monthly (SPC, Division meetings, intranet)
- Copy of previous month kept for records

How did we approach the project? Logistics

- Excel file with **sheet for each goal that** contains
 - Lots of **conditional formatting** (Excel has some fun icon sets)
 - Lots of **links** to other sheets for detailed information on
 - Who is responsible,
 - Explanation of status, progress, history
 - Table or graph if applicable
- Excel file also contains a spreadsheet for every **scorecard instance**

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How did we approach the project? Scorecard

2008-2013 Strategic Plan: Progress Report of Year 2 Action Plans

GOAL 1: Student Learning & Educational Excellence		GOAL 2: Enrollment Management		GOAL 3: Diversity & Sense of Community		GOAL 4: Community Outreach	
Action Plan	Progress*	Action Plan	Progress*	Action Plan	Progress*	Action Plan	Progress*
Continue to assess co-curricular and support areas that contribute to student learning. (2.1)	3	Enhance recruitment efforts to emphasize Penn State Berks' college status and quality degree programs. (1.1)	2	Offer formal diversity programming to students, faculty, and staff. (1.1)	3	Increase participation in community outreach. (1.1)	1
Identify new physical plant needs to support co-curricular experiences and services that enhance learning. (2.3)	2					Secure University and Penn State Berks funding for research. (1.2)	3
Improve student advising through enhanced faculty training (3.1)	1	Offer new academic programs consistent with comprehensive needs-assessment. (2.3)	2	Increase the partnerships between the Multi-cultural/ International Counselor and students. Expand collaborations between the Multi-cultural/ International Counselor and faculty. (2.1)	3	Increase level of externally sponsored research. (1.3)	3
Assess and develop comprehensive plan for tutoring and supplemental education. (3.4)	3	Align faculty staffing consistent with course enrollment and enrollment management. (2.4)	3	Encourage qualified minority high school students to enroll by engaging local organizations. (3.1)	2	Strengthen both formal and informal research interest groups (RIG) in each division to better facilitate faculty and undergraduate research. (1.5)	2
Increase resources for activities and projects that enhance learning. (4.3)	2	Develop and implement comprehensive Marketing Plan. (3.2)	3			Students will engage in undergraduate research, honor theses, and work with faculty project funded research. (3.2)	1
						Identify core competencies of faculty and staff to establish disciplinary Center(s) for Excellence. (4.1)	1
Icon/Value	Percent of Goal	Icon/Value	Percent of Goal	Icon/Value	Percent of Goal	Icon/Value	Percent of Goal
0	0.0%	0	0.0%	0	0.0%	0	0.0%
1	16.7%	1	20.0%	1	0.0%	1	5.0%
2	50.0%	2	40.0%	2	50.0%	2	14.3%
3	33.3%	3	40.0%	3	50.0%	3	23.6%

Icon/Value	Description	Overall
0	Not Started- No progress. No activity associated with action step.	0.0%
1	In Progress- Started but not finished. Some action in area but does NOT meet "How do we know..."	29.6%
2	Completed- Completed.	33.3%
3	Completed & Ongoing- Completed based on "How do we know..." but Berks will continue action step.	37.0%

* to see notes on status, click on number

Proportion of Action Steps Not Complete or Not Complete & Ongoing by Year		
Year 1	11.1%	4
Year 2	29.6%	8
TOTAL	19.0%	12

Scorecard for action steps for each year

Each action step has assigned status (color/code #)

Overall progress of goal given at bottom of each goal

Progress for each year reported

Explanation of color/code #s

Overall progress of plan given at bottom

How did we approach the project? Examples/Demonstrations

- Penn State Berks Integrated Dashboard
<http://bk.psu.edu/PRA/dashboard>
- Minnesota State Colleges & University Accountability Dashboard
<http://www.mnscu.edu/board/accountability/index.html>
- Tufts University (examples of peers, slides 22-31)
<http://institutionalresearch.tufts.edu/downloads/InstitutionalDashboardsSeptember2005.pdf>

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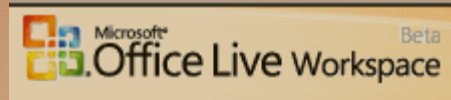


How did we approach the project? (we can't stop)... Extensions

■ ANGEL-

- SPC group

■ Cloud Computing-



- Helps in the organization & dissemination of scorecard (& other strategic plan materials)
- **Edit** (Office tools) documents in space, therefore not as clumsy as ANGEL
- Give **permission** to view or edit to students or external members (Alumni, Advisory Board Members), therefore not as clumsy as ANGEL
- One **central location** for Strategic Plan documents & materials
- Communication functionality
- Other SPC members can make changes to certain documents
- See document versions

How did we approach the project? Disadvantages

- Someone must be responsible, takes time & resources
- **Must keep up to date**
- Must be **vigilant** about communication and dissemination
- Scorecard is **static** so updates are made manually
- “**Dirty laundry**” available to external sources
(Although keeping tabs on metrics may be a marketing advantage)
- Icons are somewhat difficult to see or copy

How did we approach the project? Recommendations/Moving Forward

- Acquire tools to make updates and scorecard **less static** & **more automated**
- Determine **set of key performance indicators** not necessarily tied into strategic plan & develop scorecard for these indicators
- Get units to develop **department scorecards**
- Use **template** with other plans
Update **Flash** document with other plans
- **Share** fun & **responsibility** with other campus constituents



What results have we seen?

- **Know exactly the extent we're realizing the plan**
Know exactly what we have to do to **get there**
- Clarify who is **responsible** for the plan
- Easier to identify **priorities** for administrative discussions & budgeting ...
- Anticipate **external factors** that will affect progress with the plan
- Therefore **budgeting** is less painful because point to scorecard
- **Allocation of resources** is less painful because must align with scorecard & strategic plan

What results have we seen?

- **Visibility** of plan,
visibility of what SPC is doing
visibility of how well we're achieving our goals
- **Shared** at faculty meetings, State of College, Division Head Meetings, etc.