Continuous Improvement
Strategic Planning: Designing a Balanced Scorecard

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Overview

- Building the scorecard
- GU ITS scorecard
- Strategy in action
Building the Scorecard

- An operational strategic plan
- Goals
  - Resource prioritization
  - Transparency → Accountability
  - Continuous improvement
  - Alignment
Where we are

Where we want to be

We mean business in higher education
Building the Scorecard

• Mission – institution’s purpose

• Vision – institution’s future
Themes

• Distillation of Mission & Vision
• Areas of focus
• Examples
  • Operational Excellence
  • Financial Stewardship
  • Strategic Partnering
  • Culture Change
Themes - Pillars of Excellence

- Mission
- Vision
- Operational Excellence
- Financial Stewardship
- Strategic Partnering
- Culture Change

We mean business in higher education
Gonzaga University Themes

• Exemplary Teaching, Learning & Scholarship
• Enriched Campus Community
• Exceptional Stewardship
• Engaged Local & Global Relationships
Perspectives

• Different views of organizational performance
• Performance dimensions
• Labels vary, but concepts remain the same
Perspectives

- Colleagues
- Financial Stewardship
- Internal Process
- Organizational Capacity

- Improved Outcomes
  - Drive
  - Improved Internal Process
  - Drive
  - Improvements in Organizational Capacity

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Strategic Objectives

30,000 feet
*World Class
*Institution of Choice
*Best in the West

Continuous improvement activity that must be performed

15,000 feet
*Improve Service Quality
*Reduce Risk
*Improve Cost-Effectiveness

*Create service catalogue
*Reform project management
*Create redundancy

Ground

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Gonzaga ITS Strategy Map

Financial Stewardship
- Increase Cost-Effectiveness
- Reduce Risk
- Optimize Enterprise Architecture

Financial Stewardship
- Improve Faculty/Student Satisfaction
- Improve Service Quality
- Improve Communication

Colleagues
- Enhance Staff Productivity
- Foster a Culture of Excellence
- Enhance Capability & Skills

Internal Processes

Organizational Capacity

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Performance Measures

• **Strategic**
  – Focus on desired results
  – Derived from strategic objectives

• **Relevant to the user**
  – Measure what is intended
  – Data affects decision making

• **To be avoided**
  – Undue collection burden
  – Unintended consequences
Performance Measures

Input → Process → Output → Outcome

Strategic Business Intelligence Increases
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Strategy Map Execution

• Describe strategic objectives
• Envision intended results
• Identify performance measures
• Develop initiatives
Describe Strategic Objectives

Internal Processes – Improve Service Quality

**Description:** ITS staff must provide high-quality, reliable services that meet the needs of the University. All services offered by ITS will meet or exceed formally defined standards of timeliness, cost and quality, and will achieve consistently high levels of colleague satisfaction.
Envision Intended Results

Internal Processes – Improve Service Quality

• ITS colleagues consistently express high levels of satisfaction with the services they receive
• ITS consistently meets or exceeds its estimates of time and cost for incidents and projects
• ITS and the University share an understanding of ITS’s service commitments established through service level agreements
• ITS services are aligned with the needs and expectations of the University through the publication and maintenance of an ITS service catalog
• ITS colleagues are familiar with the department’s services
• ITS resolves as many incidents as possible at Tier 1
• ITS answers requests for support as quickly as possible
Identify Performance Measures

Internal Processes – Improve Service Quality

- Percent of SLAs met or exceeded
- Percent of projects completed on-time/on-budget
- Percent of calls resolved at Tier 1
- Average response time for classroom incidents (in minutes)
- Average speed-to-answer for calls to IT Support Center (in minutes)
Develop Initiatives

- Create ITIL-based IT service catalog
- Define SLAs for all services
- Implement routine maintenance tracking procedures

❖ Measure customer satisfaction
# ITS Scorecard

<table>
<thead>
<tr>
<th>Objective</th>
<th>Performance Measures</th>
<th>Target</th>
<th>Prior Year Qtr</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Current Qtr</th>
<th>Status</th>
<th>Change</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve Service Quality</td>
<td>1. Percent of SLAs met or exceeded</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Jones</td>
</tr>
<tr>
<td></td>
<td>2. Percent of projects completed on-time/on-budget</td>
<td>90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Bachman</td>
</tr>
<tr>
<td></td>
<td>3. Percent of calls resolved at Tier 1 (FCR)</td>
<td>75%</td>
<td>64.9%</td>
<td>64.0%</td>
<td>69.4%</td>
<td>63.2%</td>
<td>65.2%</td>
<td></td>
<td></td>
<td>Jones</td>
</tr>
<tr>
<td></td>
<td>4. Average response time for classroom incidents (in minutes)</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Jones</td>
</tr>
<tr>
<td></td>
<td>5. Average speed-to-answer (ASA) for calls to IT Support Center (in minutes)</td>
<td>2</td>
<td>0.35</td>
<td>0.3</td>
<td>0.61</td>
<td>0.37</td>
<td>0.43</td>
<td></td>
<td></td>
<td>Jones</td>
</tr>
</tbody>
</table>
ITS Dashboard

• “Improve Service Quality” Dashboard
Strategy in Action

- Drive continuous improvement
- Align funding with strategy
- Align performance with strategy
### Continuous Improvement

<table>
<thead>
<tr>
<th>Objective</th>
<th>Performance Measures</th>
<th>Owner</th>
<th>Data Source</th>
<th>Interim Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Percent of SLAs met or exceeded</td>
<td>Jones</td>
<td>SDE 10.1 SLA reporting tool (Reports to be developed as part of implementing SDE 10.1)</td>
<td>Will have at least 5 SLAs implemented by October Trustees</td>
</tr>
<tr>
<td>2.</td>
<td>Percent of projects completed on-time/on-budget</td>
<td>Bachman</td>
<td>Innotas</td>
<td>Standard performance report to be integrated into the scorecard by October Trustees</td>
</tr>
<tr>
<td>3.</td>
<td>Percent of calls resolved at Tier 1 (FCR)</td>
<td>Jones</td>
<td>Spreadsheet - \SDE Incidents - Linked Table.xlsx (Gill computer)</td>
<td>Develop a plan to transition all Tier 1 calls to the ITSC. Change metrics to Gartner Balanced Triangle approach using reopen rate, FCR rate, and overall satisfaction. Eliminate average-speed-to-answer measure</td>
</tr>
<tr>
<td>4.</td>
<td>Average response time for classroom Incidents (in minutes)</td>
<td>Jones</td>
<td>SDE Category starts with MSMC</td>
<td>Standard performance report to be integrated into the scorecard by October Trustees</td>
</tr>
<tr>
<td>5.</td>
<td>Average speed-to-answer (ASA) for calls to IT Support Center (in minutes)</td>
<td>Jones</td>
<td><a href="http://147.722.99.11:8080/niks/">http://147.722.99.11:8080/niks/ - Historical Analysis, Split, Monthly, ASA</a></td>
<td>KPI to be replaced with Gartner Balanced Triangle approach (see KPI 3 above)</td>
</tr>
</tbody>
</table>
Align Funding & Strategy

• Objective – Optimize Architecture
  – Investing in virtualization to improve responsiveness and agility
  – Assessing cloud-based alternatives for all new projects

• Objective – Optimize Staff Capability
  – Restructuring training funds to align professional development priorities with the strategic plan

• Objective – Reduce Risk
  – Investing in virtual backup software to dramatically improve disaster recovery capability
Align Funding & Strategy

- **Objective – Improve Service Quality**
  - Investing in IT analytics software to monitor and measure operational performance

- **Objective – Increase Cost-Effectiveness**
  - Investing in project portfolio management system to manage the project lifecycle
Align Performance & Strategy

- **Objective – Build a Culture of Excellence**
  - All ITS staff will participate in a strategic initiative to develop effective partnerships with administrative and academic departments

- **Objective – Optimize Staff Capability**
  - Staff receiving professional development funds must justify the expenditure in advance and demonstrate alignment with strategic plan
Align Performance & Strategy

- **Objective – Improve Service Quality**
  - All staff will be evaluated on ability to meet or exceed service level agreements
  - Project managers will be evaluated based on their ability to deliver projects on-time/on-budget

- **Objective – Improve Communication**
  - All staff will be evaluated on whether documentation is consistently up-to-date
  - Communications manager will be evaluated on the time to report outages/issues to the university community
Questions or Comments?

Thank you