



Continuous Improvement Strategic Planning: Designing a Balanced Scorecard

**NACUBO 2012 Planning & Budgeting Forum
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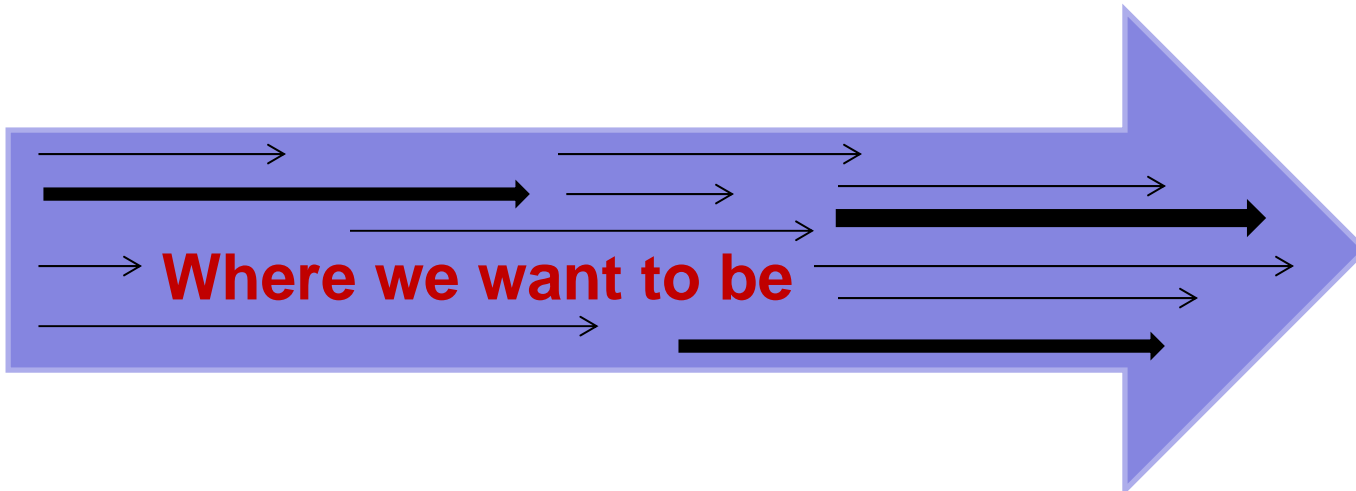
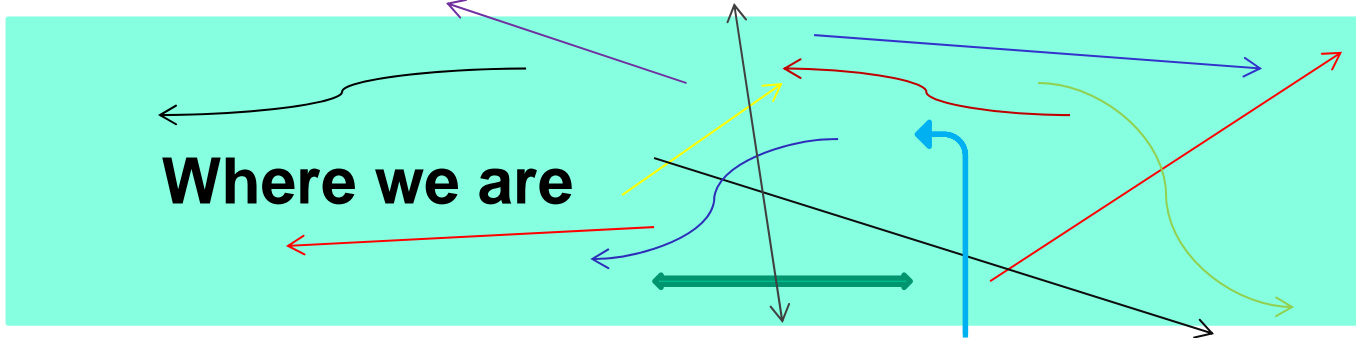
*Chris Gill, CIO, Gonzaga University

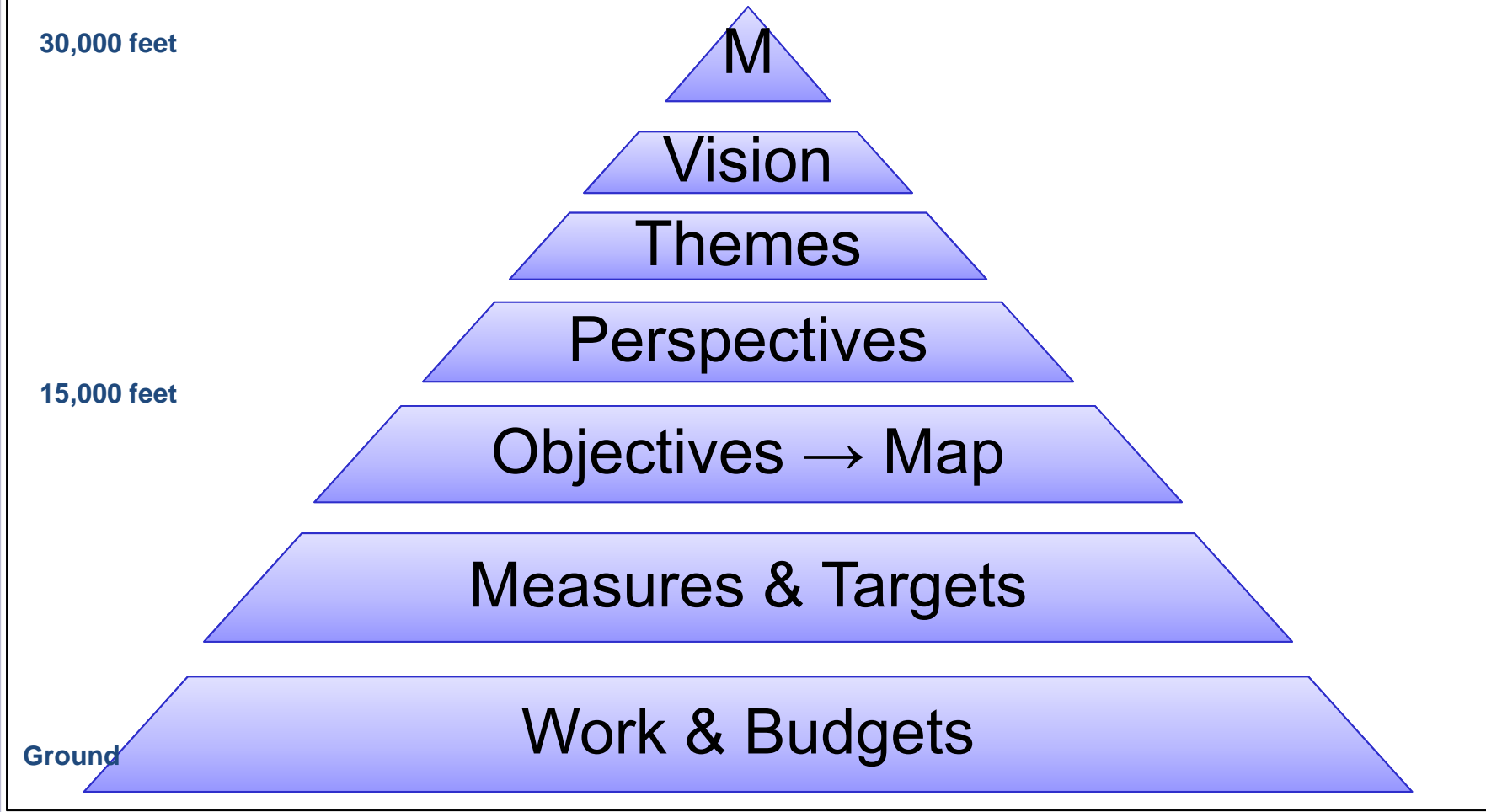
Overview

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

Building the Scorecard

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

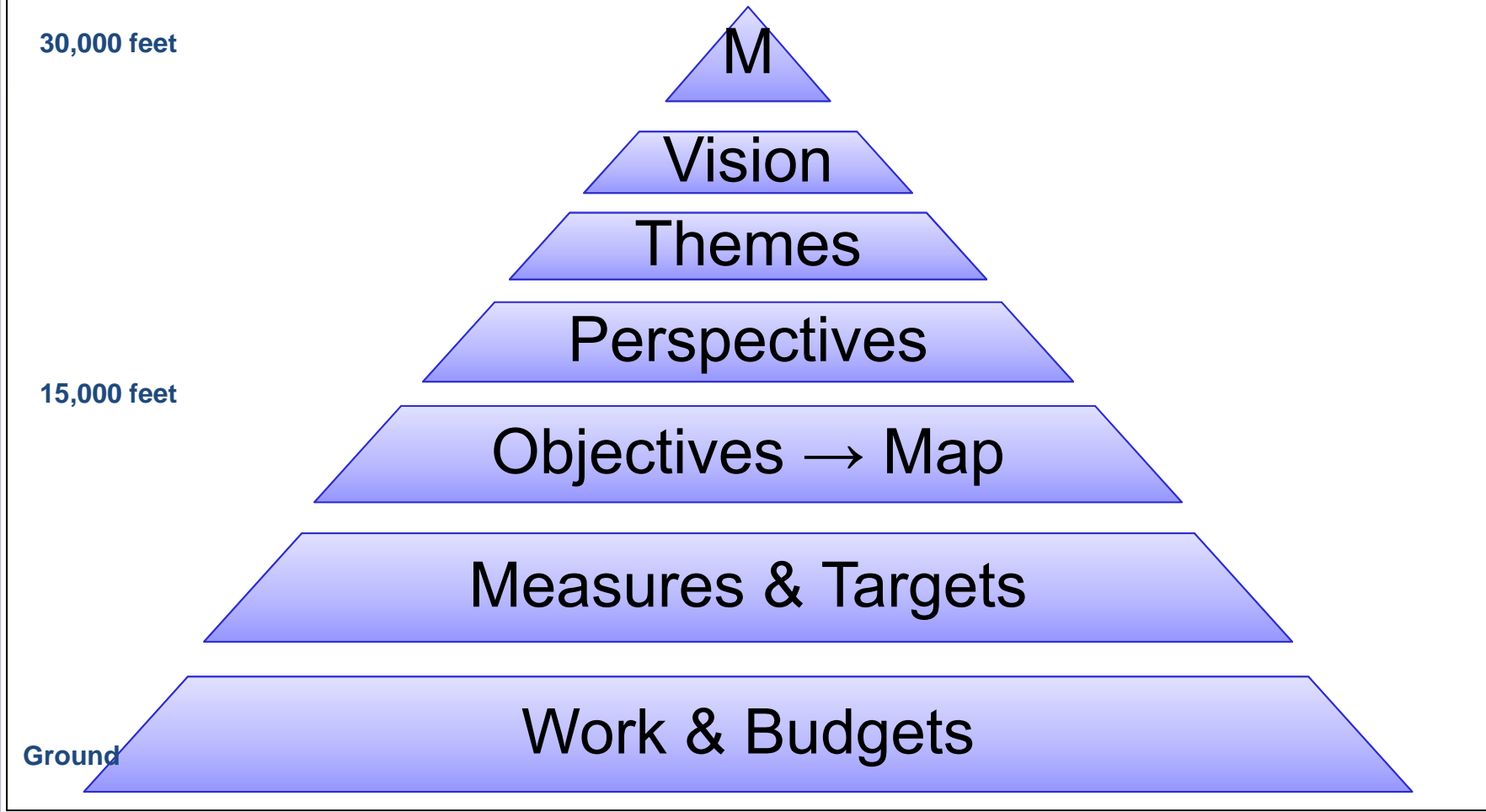






Building the Scorecard

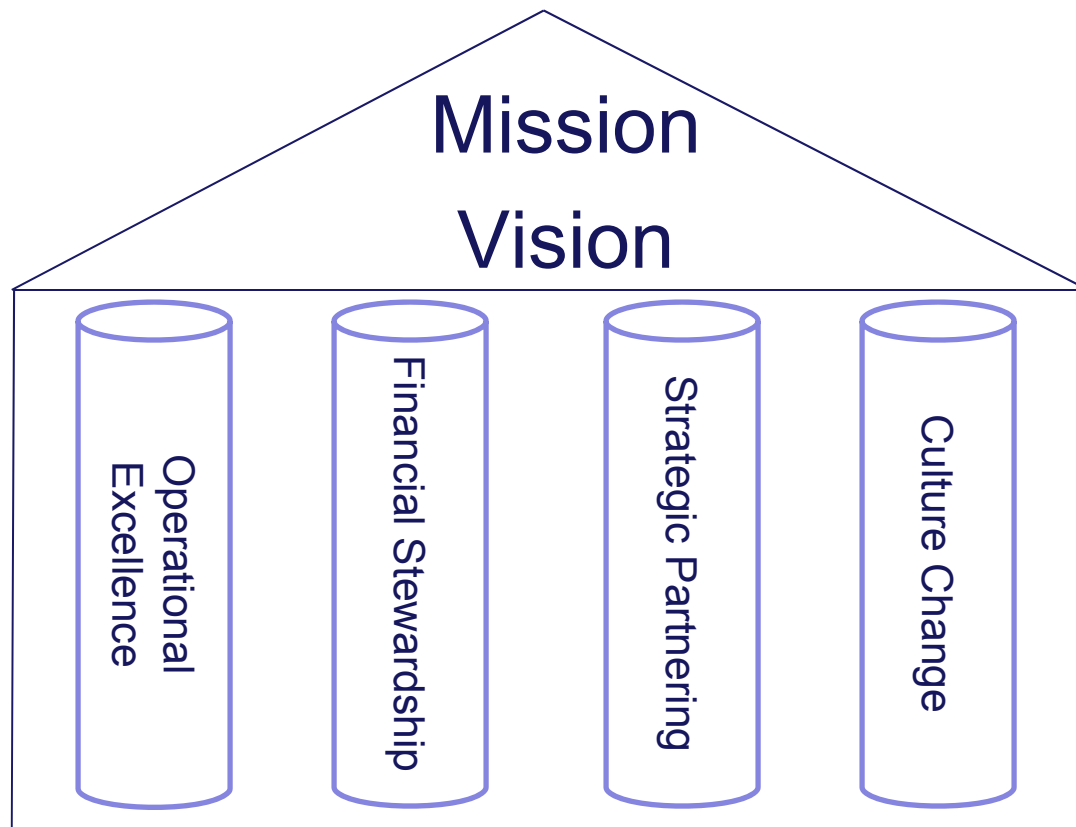
- Mission – institution's purpose
- Vision – institution's future



Themes

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

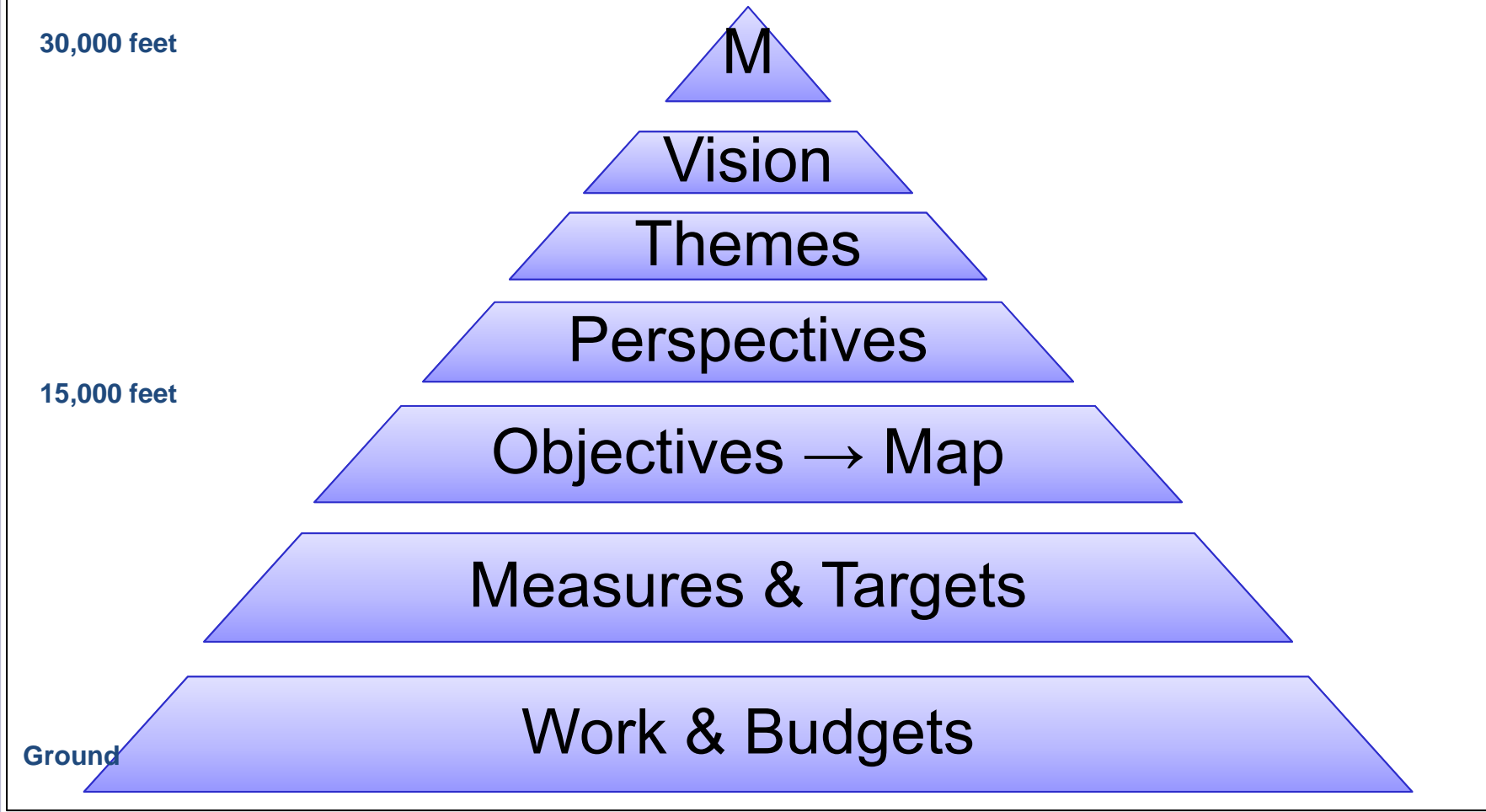
Themes - Pillars of Excellence





Gonzaga University Themes

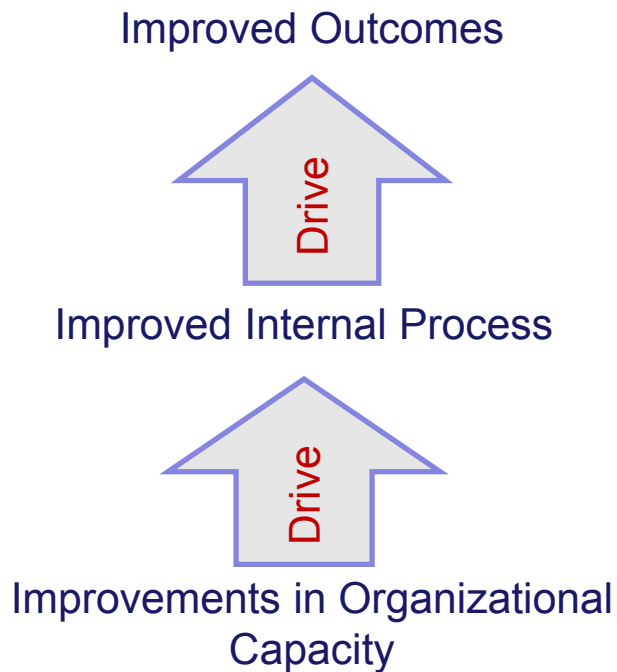
- Exemplary Teaching, Learning & Scholarship
- Enriched Campus Community
- Exceptional Stewardship
- Engaged Local & Global Relationships



Perspectives

- Different views of organizational performance
- Performance dimensions
- Labels vary, but concepts remains the same

Perspectives







Strategic Objectives

30,000 feet

**World Class*
**Institution of Choice*
**Best in the West*

15,000 feet

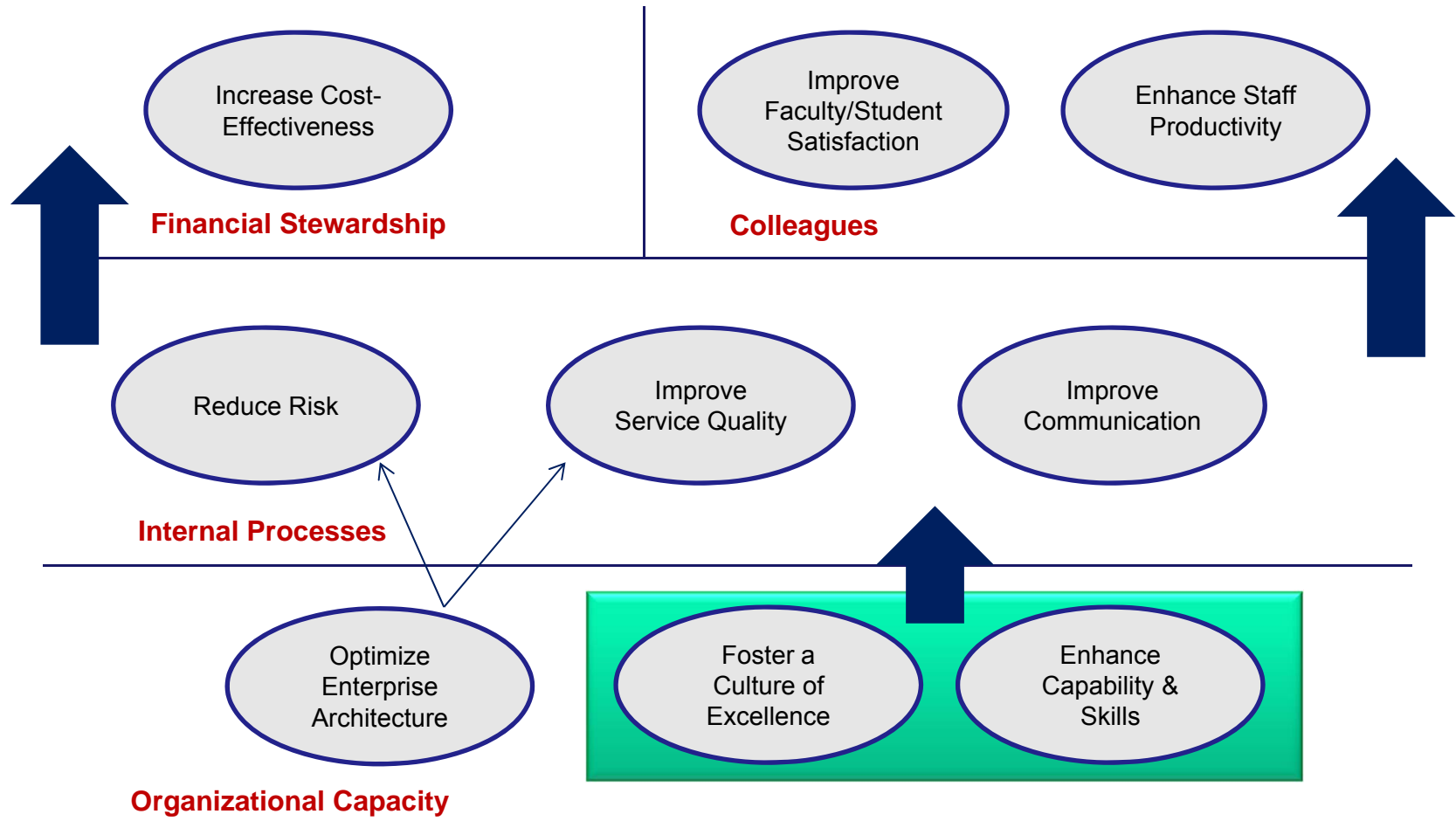
**Continuous improvement
activity that must be
performed**

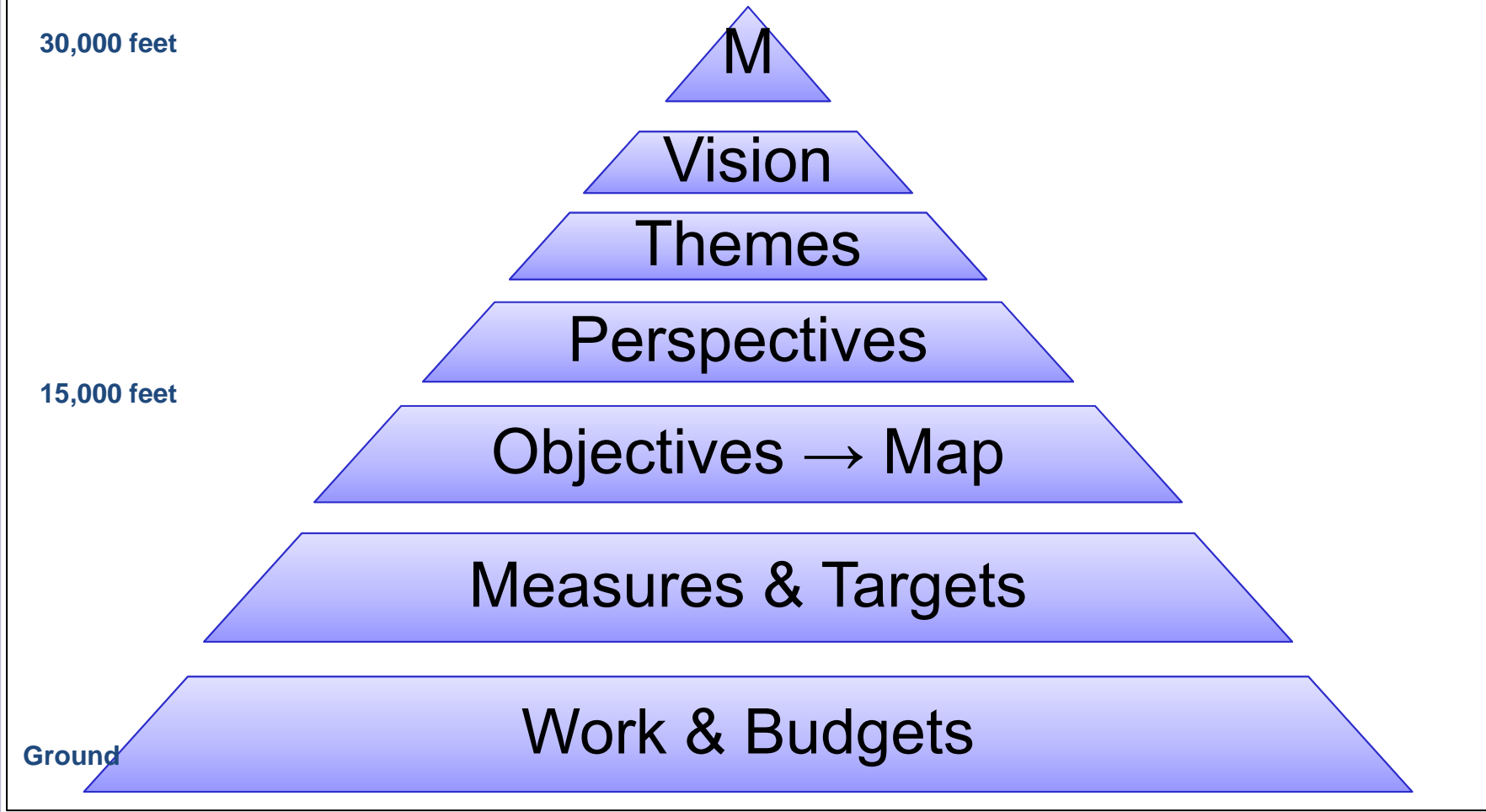
**Improve Service Quality*
**Reduce Risk*
**Improve Cost-Effectiveness*

Ground

**Create service catalogue*
**Reform project management*
**Create redundancy*

Gonzaga ITS Strategy Map

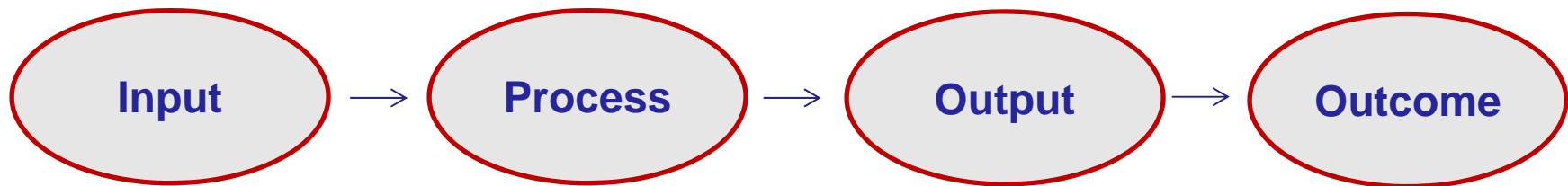




Performance Measures

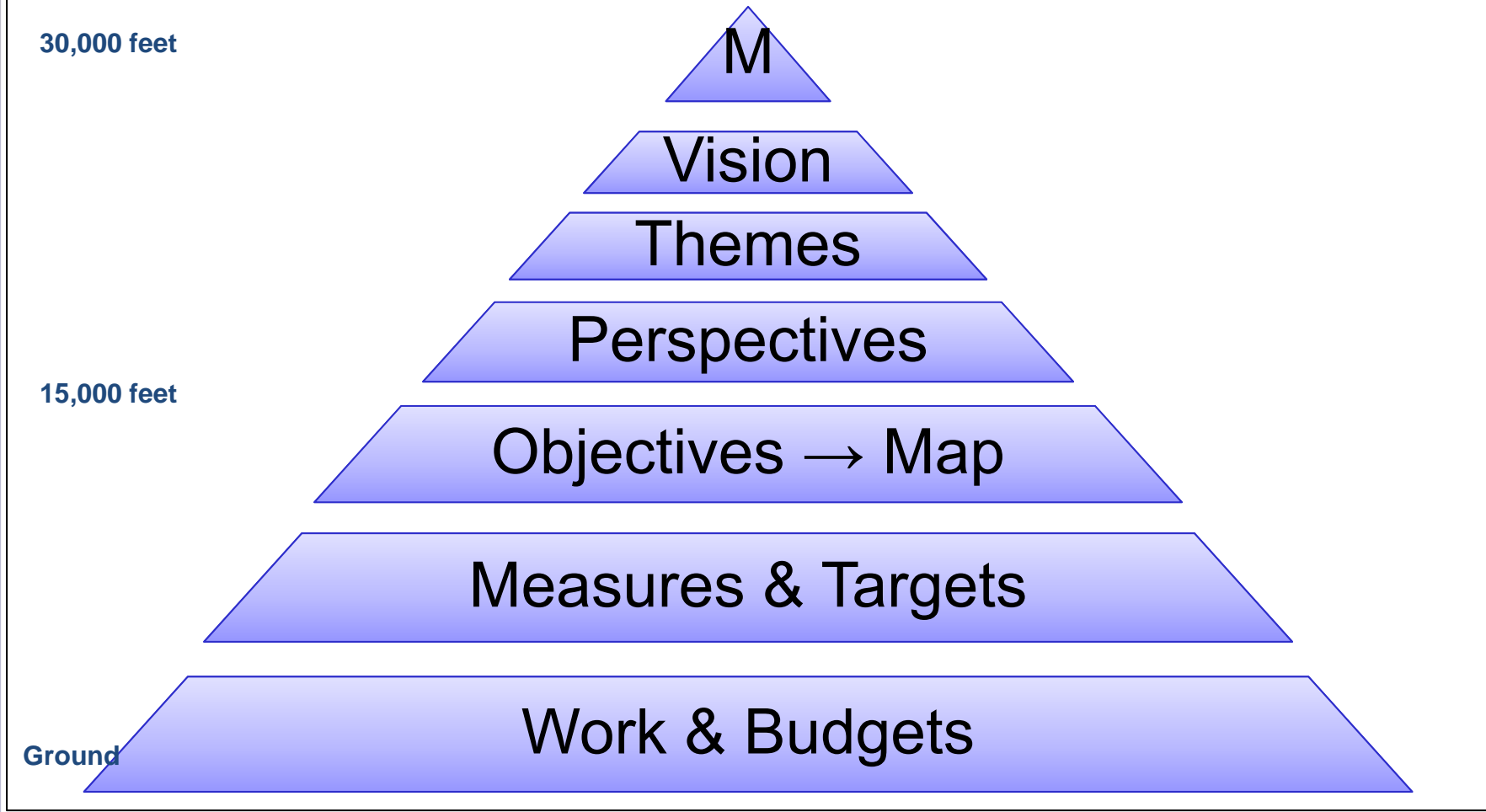
- Strategic
 - Focus on desired results
 - Derived from strategic objectives
- Relevant to the user
 - Measure what is intended
 - Data affects decision making
- To be avoided
 - Undue collection burden
 - Unintended consequences

Performance Measures



Strategic Business Intelligence Increases

A large, light gray arrow pointing to the right, with a purple outline. The text 'Strategic Business Intelligence Increases' is written inside the arrow in a bold, blue, italicized font.



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)

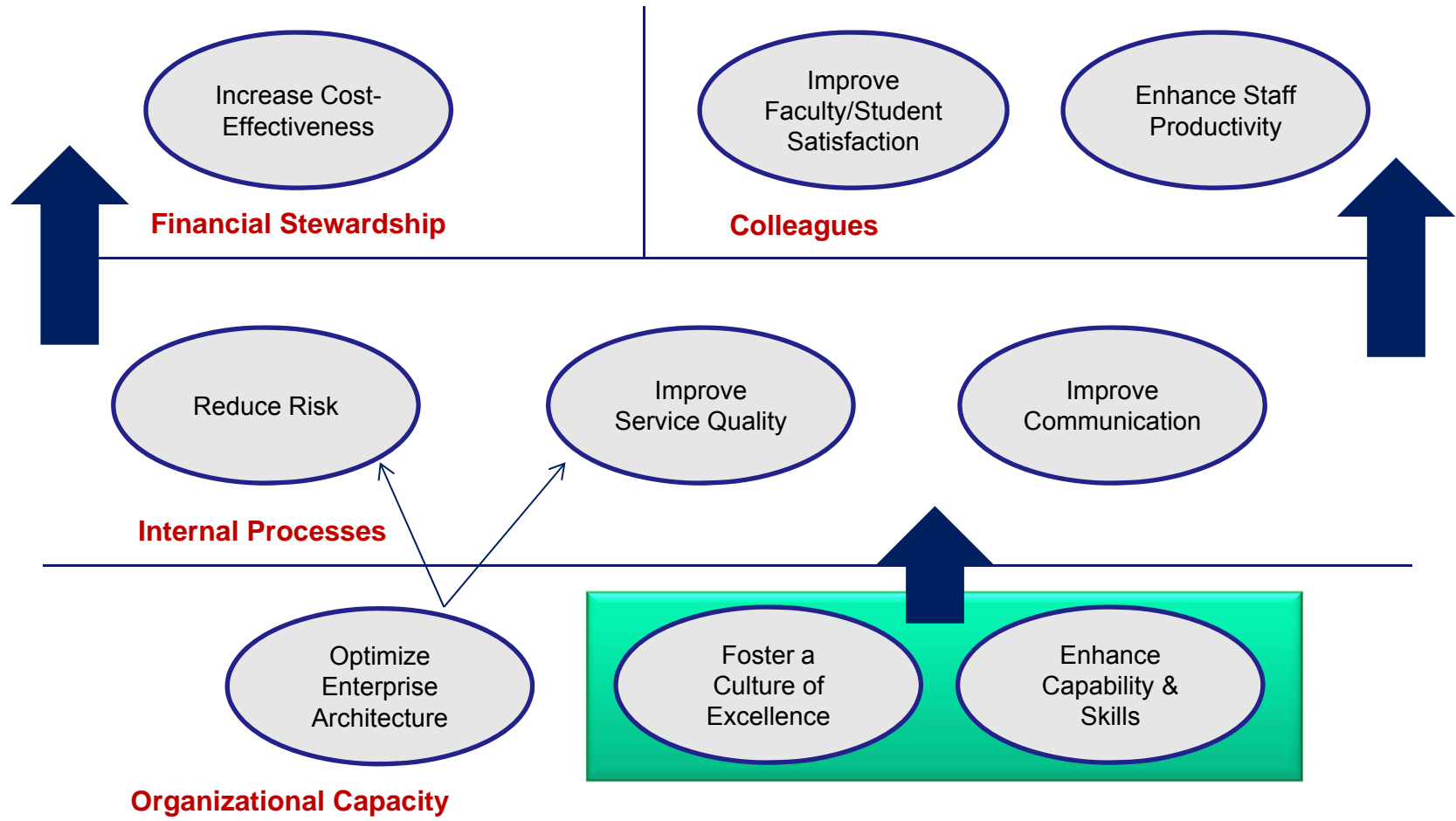
Develop Initiatives

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

❖ Measure customer satisfaction



Gonzaga ITS Strategy Map





ITS Scorecard

ITS Balanced Scorecard - 2-2012.xlsx - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Acrobat

Clipboard Font Alignment Number Styles

B31 1. Percent of IT incidents, projects, changes with current information

	A	B	C	D	E	F	G	H	J	K	L
19	Perspective - Internal Processes										
20	Objective	Performance Measures	Target	Prior Year Qtr	Q1	Q2	Q3	Current Qtr	Status	Change	Owner
26	Improve Service Quality	1. Percent of SLAs met or exceeded	90%						●	→	Jones
27		2. Percent of projects completed on-time/on-budget	90%						●	→	Bachman
28		3. Percent of calls resolved at Tier 1 (FCR)	75%	64.9%	64.0%	69.4%	63.2%	65.2%	●	↑	Jones
29		4. Average response time for classroom incidents (in minutes).	10						●	→	Jones
30		5. Average speed-to-answer (ASA) for calls to IT Support Center (in minutes)	2	0.35	0.3	0.61	0.37	0.43	●	↑	Jones



ITS Dashboard

- [“Improve Service Quality” Dashboard](#)

Strategy in Action

- Drive continuous improvement
- Align funding with strategy
- Align performance with strategy



Continuous Improvement

Perspective - Internal Processes					
Objective	Performance Measures	Owner	Data Source	Interim Objective	Met Interim Objective
Improve Service Quality	1. Percent of SLAs met or exceeded	Jones	SDE 10.1 SLA reporting tool (Reports to be developed as part of implementing SDE 10.1)	Will have at least 5 SLAs implemented by October Trustees	→
	2. Percent of projects completed on-time/on-budget	Bachman	Innotas	Standard performance report to be integrated into the scorecard by October Trustees	↑
	3. Percent of calls resolved at Tier 1 (FCR)	Jones	Spreadsheet - \\gill\SDE Incidents - Linked Table.xlsx (Gill computer)	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	→
	4. Average response time for classroom incidents (in minutes).	Jones	SDE Category starts with MSMC	Standard performance report to be integrated into the scorecard by October Trustees	→
	5. Average speed-to-answer (ASA) for calls to IT Support Center (in minutes)	Jones	http://147.222.99.11:8080/niks/ - Historical Analysis, Split, Monthly, ASA	KPI to be replaced with Gartner Balanced Triangle approach (see KPI 3 above)	↑

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