

# Joliet Junior College

Improving Institutional Effectiveness  
with a Balanced Scorecard

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# An Overview

- What is a Balanced Scorecard and how is it used?
- How does a Balanced Scorecard differ from traditional models?
- What is a Dashboard and what will it display?
- What are Key Performance Indicators and which ones are useful for JJC?
- What are Operational Measures and how are they included?
- What are the proposed steps to implementation?

# What is a Balanced Scorecard?

**Definition:** A set of measures that gives top leaders a quick but comprehensive view of the organization.

In the words of Robert S. Kaplan and David P. Norton, a Balanced Scorecard is *“the translation of the ... unit’s strategy into a linked set of measures that define both the long-term strategic objectives as well as the mechanisms for achieving those objectives.”*

# How is a Balanced Scorecard used?

- It is both a *process* and a *tool*.
- It identifies unfavorable trends or patterns and helps to focus energy on improving priority areas.
- It monitors performance to ascertain what is working well and where additional attention is needed.
- A few (4 – 6) Key Performance Indicators represent the most central areas related to high performance.

# How does a Balance Scorecard differ from traditional models?

- Business models focused on financial reports
- BSC uses a *Dashboard* to display information visually
- The BSC model includes other areas, resulting in a more balanced look at an organization
  - ✓ Learning & Growth
  - ✓ Customer Relations
  - ✓ Internal Processes
  - ✓ Financial Measures

# Balanced Scorecard vs. Traditional

- Emphasis on big picture
  - Fact-based
  - Visual, with uniform appearance
  - Uncomplicated presentation style
  - Integrates information and aligns with Strategic Plan
- Emphasis on assorted details
  - Anecdotal
  - Text-based, with various formats
  - Focuses on complex data
  - Reports are separate and lack alignment

# What is a Dashboard?

- A Dashboard is a visual model of progress measured against appropriate benchmarks.
- A Dashboard uses the concept of a car's dashboard:
  - Gauges indicate levels of progress similar to measures of levels of the car's operational needs (e.g., oil, battery charge, temperature)
  - Readily understood colors, such as red-yellow-green, indicate ranges measured against a benchmark.



# What will the Dashboard will display?

- College-wide key performance indicators and summary data for each academic unit
- Information for several time periods
  - semester, quarter, annual, depending on frequency of measuring the item
- A combination of related items on one screen
- Short definitions of data items
- Electronic links to improvement plans

# What are Key Performance Indicators?

- They are college-wide measures tied to Strategic Planning.
- They are focused, high-priority measures.
  - They can be broken down to measures at the departmental level.
  - They can cover academic, financial, and student support activities.

# A Sample of Possible JJC Key Performance Indicators

- Enabling Students to Achieve their Academic Goals
- Faculty Training, Support & Compensation
- Serving Under-represented Groups
- Collaboration with External Stakeholders
- Providing State-of-the-Art Facilities

# What are Operational Measures?

- Detailed measures selected to support KPIs.
- Statistical information selected by specific departments and operating units.

# An Example of Operational Measures

- KPI—Enabling Students to Achieve their Academic Goals
- Operational Measures to support the KPI
  - Enrollment figures and trends
  - Grade distributions
  - FT/PT faculty ratios and class sizes
  - Assessment data on learning outcomes
  - Transfer statistics
  - Licensure pass rates
  - Perkins-related measures (for occupational disciplines only)

# Proposed Steps to Implement

- Choose layout and supporting technology
- Determine Key Performance Indicators
- Determine a Process for Development
- Involve the campus community