



Building a Government Balanced Scorecard

Phase 1 - Planning

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Example of a Government Balanced Scorecard Implementation



- ***Mecklenburg County, N. Carolina***
- ***Howard Rohm, Consultant and Facilitator***

Step 1: Team Formation and Organizational Assessment



- ***Selected strategic team***
- ***Developed team plan, schedule, budget***
- ***Examined mission, vision statements; draft a “vision of the future” for the organization***
- ***Identified needs, key success factors to achieve the vision***



Engagement Timetable

<i>3 Weeks</i>	<i>4th Week</i>	<i>5th-7th Weeks</i>	<i>8th-32nd Weeks</i>
<i>Management review, resource commitments</i>	<i>Team selection</i>	<i>Team orientation and training</i>	<i>Build and implement processes</i>



Tools for Organizational Assessment

- ***Mission & Vision statement reviews***
- ***Organization chart review***
- ***Customer Analysis***
- ***Organizational Assessment survey***
- ***SWOT Analysis***
 - Strengths, Weaknesses, Opportunities, Threats
- ***Benchmarking against other organizations***
- ***Gap analysis***

Mecklenburg County Vision Statement

- ***“In 2015, Mecklenburg County will be a community of pride and choice for people to LIVE, WORK and RECREATE.”***



Step 2: Define Strategic Themes



- ***Derived from vision & assessments***
- ***Sorted out related issues***
- ***Provided more specific focus for planning***



Examples of Strategic Themes for Mecklenburg County

- ***1. Effective and Efficient Government***
- ***2. Social, Educational, and Economic Opportunity***
- ***3. Community Health & Safety***
- ***4. Growth Management & Environment***

Step 3. Define Perspectives and Desired Outcomes



- ***Perspectives: diverse ways of looking at the organization***
- ***Desired Outcomes: meaning of mission success for each perspective & strategic theme***

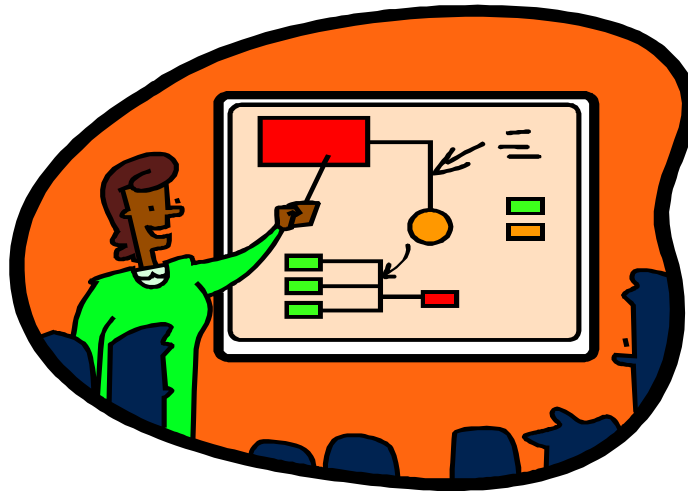
Example of Strategic Framework (Perspectives & Strategic Themes)

	Theme 1: Effective & Efficient Government	Theme 2: Social, Education, & Economic Opportunity	Theme 3: Community Health & Safety	Theme 4: Growth Management & Environment
<i>Perspective:</i>				
<i>Customers</i>				
<i>Business Processes</i>	Desired Outcomes			
<i>Financial Value</i>				
<i>Learning & Capacities</i>				

Examples of Perspectives and Desired Outcomes

- ***Perspectives:***
 - Employee and Organizational Capacity
 - Internal Business Processes
 - Customer View
 - Financial Value
- ***General Goal:***
 - “Mecklenburg government will provide services in a highly efficient, effective and inclusive manner, and be accountable for results.”

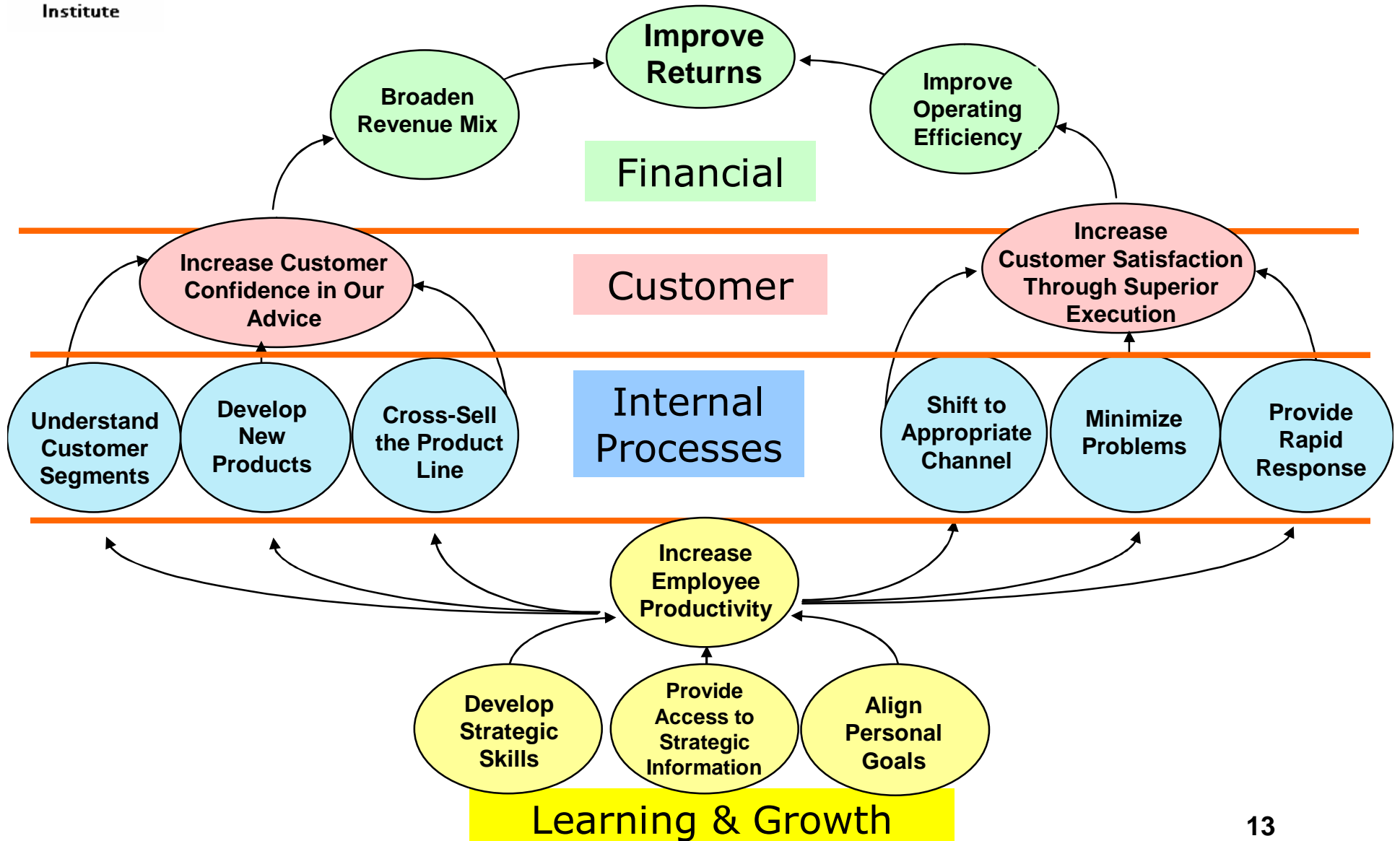
Step 4. Create a Strategy Map



- *For each strategic theme, the team proposed a chain of causes and effects that they believe will lead to the desired outcomes.*
- *They mapped the chain on a “strategy map”.*



Strategy Map (example)

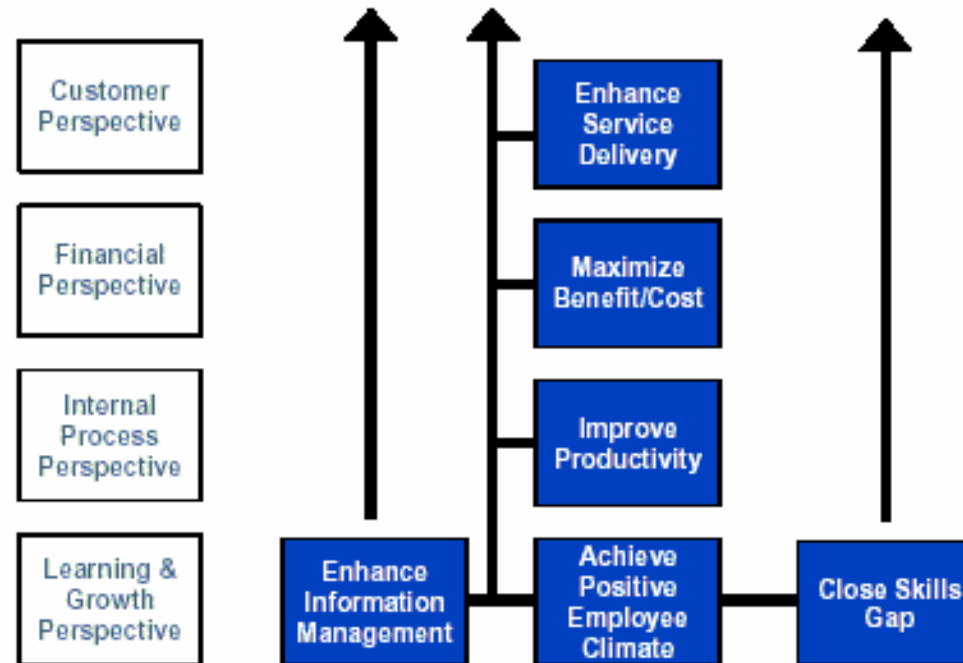


Example of Mecklenburg County Strategy Map

Business Support Services Scorecard

“SMART GROWTH”

City Council Focus Area: Restructuring Government

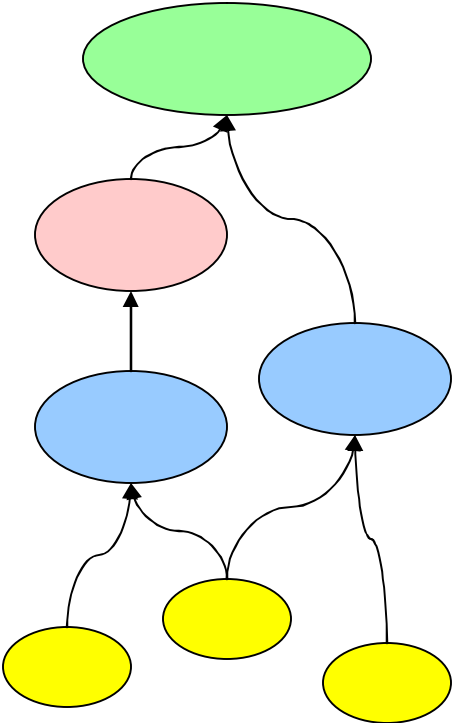
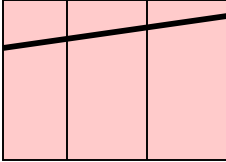
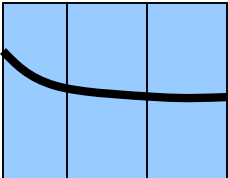
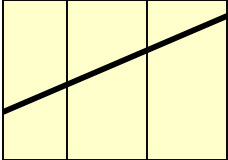


Step 5. Define Performance Measures and Targets

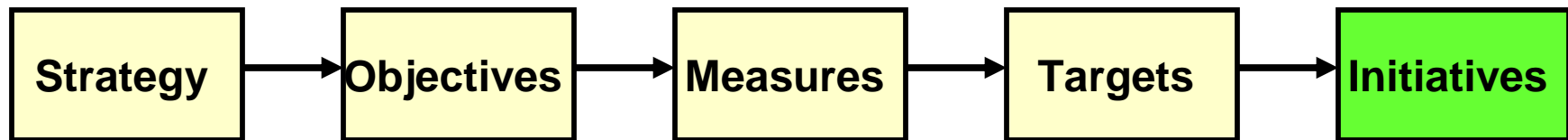


- ***For each theme/desired outcome goal, the team asked “how will we know if this goal is being achieved?”***
- ***Team identified how each goal should be measured, e.g. surveys, data collection, etc.***
- ***Team examined baseline data (where available) to set schedules and targets***

Example of Strategic Plan

Strategy Map	Metrics	Targets	Strategic Initiatives
	<p>→</p> <p>Customer approval rating</p>	<p>→</p> 	<p>•</p> <p>•</p> <div data-bbox="1381 732 1976 1166" style="border: 1px solid black; background-color: #ffffcc; padding: 5px;"> <p>Each Strategic Initiative Plan contains:</p> <ul style="list-style-type: none"> • Sponsor • Schedule • Resources • Budget </div> <p>•</p> <p>•</p>
	<p>Cycle time reduction</p>		
	<p>% strategic skills available</p>		

Measures Before Projects!

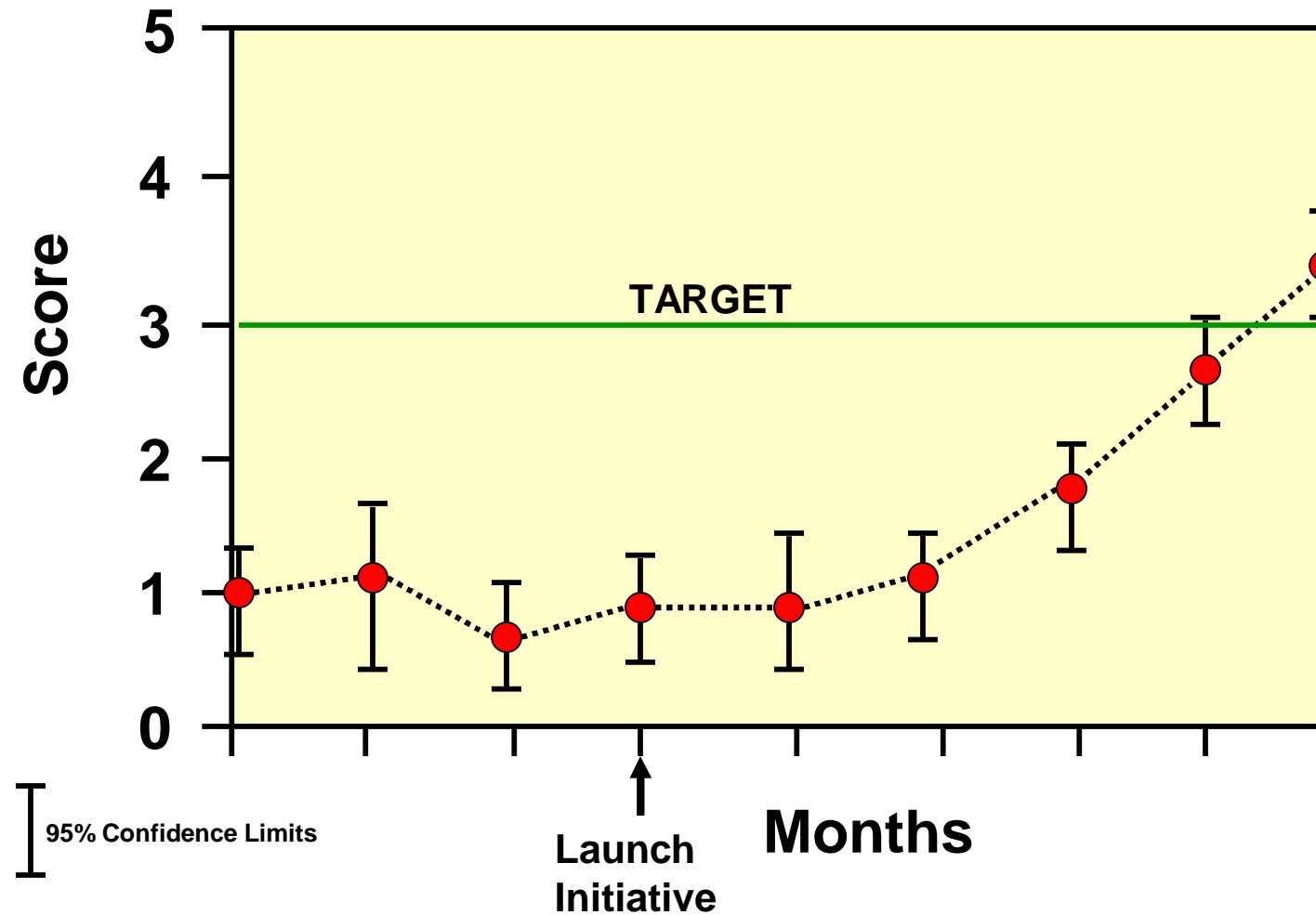


“The strategic planning process should use initiatives to help the organization achieve its strategic objectives, not as ends in themselves.

Public sector and nonprofit organizations are especially guilty of often confusing initiative completion as the target rather than improvements in mission objectives and agency effectiveness.”

-- Kaplan & Norton, 2001

Example of Performance Measurements



Step 6. Develop Strategic Initiatives



- ***The team prioritized needs based on strategic importance and performance, and created initiatives for improvements***
- ***Each initiative was linked to strategic measurements so its progress could be monitored***

Example of Strategic Initiatives

	Corporate Objective	KBU Initiative	Measure	Prior Yr Actual	Lead/ Lag	Performance Data		
						Target	YTD	Status
Internal Process	Improve Productivity	Facilitate the implementation of a citywide strategic technology planning framework by identifying future opportunities for the City to apply technology in a cooperative manner that result in greater efficiencies and/or cost savings	Publication of pilot technology strategy document		Lead	By October 2002 for use in the FY04/05 Budget and Business Plan process		
Learning & Growth	Enhance Information Management	Serve as strategically focused guides to facilitate progress toward Smart Growth Initiatives	Deployment of the Virtual Map Book for City/County Customer service and Information Center		Lead	12/31/02		
			Develop common database design for Capital Improvement Plan		Lead	06/30/03		
			Implement framework for the spatial data warehouse, including data standards, custodians and metadata		Lag	06/30/03		



Mecklenburg County BSC Implementation Milestones

- **October 2002** **County results reported in local news**
 - **May 2002** **Department/Division Scorecards Completed**
 - **February 2002** **BOCC Approved Community & Corporate Scorecard**
 - **June 2001** **BOCC Adopted Mecklenburg Vision 2015**
 - **March 2001** **BOCC Established Vision Elements**
 - **January 2001** **BOCC Agreed to Develop a Community Vision**
- **(BOCC = Board of County Commissioners)**



BSC Implementation Milestones, Cont.

- ***Nov. 2002 – Request for Proposal to acquire an automated BSC system***
- ***Feb. 2003 – Select best bid and award contract for initial system***
- ***Apr. 2003 – Initial system demonstration***
- ***June 2003 – Expand coverage of data collection and reporting***

Step by Step to Specific Plans

