Balanced Scorecard
User Manual

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1.0 Introduction

The Balanced Scorecard is an approach to strategic management developed in the early 1990’s by Drs. Robert Kaplan of the Harvard Business School and David Norton. The technique involves defining key strategies for achieving an organization’s vision and key performance measures to manage and improve execution on that vision. The Project Management and Oversight Process is a technique for managing ongoing large projects. By combining the two, organizations can turn their vision, mission, and goals into a set of performance measures that provides the framework for implementing its strategy.

“Recognizing some of the weaknesses and vagueness of previous management approaches, the balanced scorecard approach provides a clear prescription as to what companies should measure in order to “balance” the financial perspective. The balanced scorecard is a management system (not only a measurement system) that enables organizations to clarify their vision and strategy and translate them into action. It provides feedback around both the internal business processes and external outcomes in order to continuously improve strategic performance and results. When fully deployed, the balanced scorecard transforms strategic planning from an academic exercise into the nerve center of an enterprise.”

The Scorecard is a balance across four perspectives as shown in Figure 1:

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1 The Balanced Scorecard Institute Website
For use in education, the four perspectives are often renamed as follows:

1. Financial – District/School Budget
2. Employees – Administrators, Teachers, and Staff
3. Learning and Growth – Curriculum/Instruction and supporting processes
4. Customers – Students/Parents

Value to an organization:

- Defines the strategies needed to achieve the organization’s vision as well as the measures for determining whether the strategies are effective.
- Ensures strategies are properly balanced between the critical perspectives necessary to ensure long-term, sustainable results.
- Identifies the current performance against the measures (baseline data) and the target performance desired at predetermined points.
- Identifies the specific projects needed to accomplish strategic objectives.
2.0 Logging In

Step 1: Log in

From the home page (http://scorecard.celt.org), you can select either **Find Proven Practices** or **View Existing Scorecard**, as shown in Figure 2. This will direct you to a dialogue box from which you will be prompted to login.

Step 2: Log in Screen

In the dialogue box shown below, enter your **User Name** and **Password**. Your User Name for the Log In dialogue box (Figure 3) is the email address with which you registered and the unique password assigned by the system administrator during your training.

Contact your system administrator for any issues associated with this log in procedure.
3.0 Create a Scorecard

**Step 1: Initiate Scorecard Creation**

From the home page ([http://scorecard.celt.org](http://scorecard.celt.org)), select **View Existing Scorecard**. You will be prompted to login.

**Step 2: Adding a New Scorecard**

Click the button **Add New Scorecard**. (Figure 4)

**Step 3: Naming**

After clicking the Add New Scorecard button, a textbox will appear. Enter the desired name of the new scorecard and click **Add Scorecard** which will appear to the right of the textbox. (Figure 5)
Upon the creation of a new scorecard, the webpage will refresh with a confirmation message and the newly created scorecard. (Figure 6)
4.0 Scorecard Management Tools

Upon selecting View Existing Scorecard from the homepage, you will be taken to the list of Scorecards for your organization. Each Scorecard has three links for managing the Scorecard: Print-View, Edit Scorecard, and Delete. (Figure 7)

<table>
<thead>
<tr>
<th>Scorecard</th>
<th>Print-View</th>
<th>Edit Scorecard</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Scorecard</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4.1 Print-View

The Print-View link will display the selected Scorecard in a printer-friendly view. This view also displays all completed Scorecard information without any editing hyperlinks.

4.2 Edit Scorecard

This link will allow you to set and edit all items within the Scorecard and also will take you to the page where all Scorecard Targets and Actuals exist.

4.3 Delete

This will permanently delete the Scorecard from the website.
5.0 Initial Scorecard Development

5.1 Development of Mission and Vision

The Balanced Scorecard process all begins with the organization’s mission and vision.

A **mission** is a concise statement that describes the reason the department, program or unit exists, what services it offers, and to whom. A sample mission statement may be as follows:

“Provide high quality educational opportunities that will inspire all students to acquire and use the knowledge and skills needed to succeed in a culturally diverse and technologically sophisticated world.”

A **vision** is a statement of where and what the organization wants to be in the future. This statement captures a picture of the future along select dimensions. Departmental statements should be aligned with district vision. A sample vision statement may be as follows:

“Every student will graduate with the knowledge and the skills to be successful in post-secondary education/or the workforce.”

The Balanced Scorecard process uses the Vision, Mission, and Goals of the organization as the foundation for a set of management systems that work together to create a cohesive whole as illustrated in Figure 8:

![Balanced Scorecard Diagram](image-url)
5.1.1 Adding the Organization’s Mission and Vision

As explained above, it is critical for the organization to develop and adhere to a mission and vision statement. The Balanced Scorecard tool provides a location for the entry of both statements so as to act as a constant reminder of these guiding principles as the organization works to fulfill each statement.

Step 1: Edit Scorecard

From the Select Scorecard page, click on Edit Scorecard. (Figure 9)

Step 2: Vision & Mission Location

In the Vision and Mission module an Edit link is located next to each term. (Figure 10) Clicking on the link will open a text box where the appropriate statement may be entered. (Figure 11)
Step 3: Finalizing

Select **Update** to complete.

Select **Cancel** to disregard any changes. (Figure 11)
5.2 Defining Goals

Following the development or review of the organization’s vision and mission, a set of goals are agreed upon that will move the organization towards its vision. A goal is a broad statement that describes a desired outcome for a department, program, or unit. The goal or desired outcome establishes the department’s long-term priorities and influences the development of short-term objectives.

A possible example of a school district goal may be: “Increase student achievement.”

5.2.1 Adding a Goal

As goals will be an important piece in the development of the Scorecard, it is strongly suggested that all goals be added before moving on to adding Strategies.

Step 1: Edit Scorecard

From the Select Scorecard page, click on Edit Scorecard (Figure 12)

Step 2: Goal Location

The Goal module is titled Goal Name. (Figure 13)

Select Add New Goal and a textbox will appear.

Step 3: Adding Text

Enter the appropriate Goal text (can be typed or pasted). (Figure 14)
**Step 4:** Finalizing

Select **Add** to complete. (Figure 14)

Select **Cancel** to disregard any changes.

![Figure 14]
5.2.2 Edit Goal Name & Number

**Step 1:** Edit Scorecard

From the Select Scorecard page, click on **Edit Scorecard** (Figure 15)

![Scorecard](image)

**Step 2:** Goal Location

Beneath **Goal Name** appears any previously created Goals. (Figure 16)

Select **Edit** next to the goal that is to be edited and a textbox will appear.

![Edit Goal](image)

**Step 3:** Editing Goal Name & Goal Number

Once the page reloads, the **Goal Name** and **Goal Number** can be modified using the text boxes. (Figure 17)

![Edit Goal](image)

**Step 4:** Finalizing

Select **Update** to complete.

Select **Cancel** to disregard any changes.
5.3 Developing Strategies and Strategic Objectives

Once the vision, mission, and goals of the organization are agreed upon, the Balanced Scorecard process is a six-step approach designed to develop initiatives that address organizational pains and are aligned with objectives, strategies, measures, and desired results.

This six-step approach is shown in Figure 18:

A strategic objective is a measurable statement that defines an end result that is expected to be accomplished in a given period of time.

A strategic objective of the above goal might be:

“Increase each middle school student’s literacy scores.”

Strategies explain how we intend to reach the strategic objectives. A strategy is a statement of action that describes the means to be used to achieve the goals and objectives.

Strategy Themes may be created under which strategies may be grouped or clustered.

Sample strategies for reaching the literacy goal and objective above may be:

- Use formative assessments to assess progress
- Increase the individualized instructional time provided to students with scores in the bottom quartile
- These strategies could be grouped under a Strategy Theme of “improve Literacy”
5.3.1 Adding a Strategy to a Scorecard Perspective

**Step 1: Edit Scorecard**

From the **Select Scorecard** page, click on **Edit Scorecard** (Figure 19)

![Figure 19](image1)

**Step 2: Strategy Location**

Strategies are grouped by Perspective as discussed in the introduction of this document. Since this Balanced Scorecard is focused on education, the Perspectives are: Customers, Internal Business Process, Professional Development, and Student Achievement. Each Perspective has an **Add New Strategy** button. (Figure 20)

![Figure 20](image2)
Step 3: Adding a Strategy

In the text box, enter a Strategy for the selected Perspective. (Figure 21)

![Figure 21]

Step 4: Finalizing

Select **Add Strategy** to complete.

Select **Cancel** to disregard any changes.

![Figure 22]
5.3.2 Customizing a Strategy for a Scorecard Perspective

Once a strategy has been added to a Scorecard perspective, it is important to add the Strategic Objective, Project Name, Sponsor Name and Manager Name. Adding this information at the beginning will ensure clarity and alignment as the project moves forward.

Step 1: Edit Strategy

In the newly created strategy, select Edit Strategy. Once the page reloads, there will be several text boxes available for necessary information to be entered. (Figure 23)

Step 2: Adding Text & Attaching Goal

Enter one strategy addressing one strategic objective per strategy section. This will ensure that all strategies are properly aligned within the computer program. When finished entering text, be sure to align the strategy with a Goal.

All goals will appear in the dropdown list to the right of the textboxes. If all of the Goals have not been entered, it would be a good idea to complete that part of the process before adding strategies.

Step 3: Finalizing

Select Update to complete.

Select Cancel to disregard any changes.
5.4 Defining Measures

There is an old adage that states “We can only manage what we can measure”.

In order to monitor progress towards the strategic objective, it is necessary to define how we will measure that progress. A measure is a quantifiable representation of activities performed by a department, program or unit in pursuit of an objective. Typical measurement categories include outcomes, outputs, efficiency, and productivity.

Sample measures for the above strategy might include:

- Formative assessment results on reading
- Reading scores by sub-strand by ethnic group
- Minutes of individualized remediation per bottom quartile student

A Key Performance Indicator (KPI) quantifies the measure, such as:

- % of students who can draw conclusions, make inferences, and deduce meaning from texts
- % of students who can interpret information in new contexts
- % of students who can identify the main idea of a text and author’s point of view and purpose
- % of students who can analyze the style or structure of a text

5.4.1 Adding Measures

**Step 1:** Edit Scorecard

From the Select Scorecard page, click on Edit Scorecard. (Figure 24)
Step 2: Measures Location

To the right of each Perspective Strategy is a spot for Key Performance Indicators. (Figure 25)

Select Add Measure for the desired Strategy to which a new KPI is to be added.

Step 3: Add New Measure

A textbox will appear. Type or paste text into this textbox. (Figure 26)

Step 4: Finalizing

Select Add Measure to complete.

Select Cancel to disregard any changes.
5.5  Defining Baseline

Once the measures and KPI’s are determined, it is important to understand the current status of each measure, a baseline. The baseline is the current level of standing for the measure to be used. Sample baselines might include:

- 65% of fourth graders are reading on grade level
- 10 minutes of individualized instruction is available for each fourth grader
- 1 reading assessment is given per year

5.5.1 Setting a Baseline in the Scorecard

To define the baseline for a particular Strategy, the following tasks must be completed:

- A Strategy must be set for a perspective
- Goals must be created and applied to a Strategy
- At least one measure must be attached to a goal

Step 1: Edit Scorecard

From the Select Scorecard page, click on Edit Scorecard  (Figure 27)
Step 2: Setting the Baseline

When the page reloads, it will display the baseline as a numeric value. This value is any existing available data reflecting the current level of performance for a related measure, and is the starting point for reaching the target level of performance. (Figure 28)

Step 3: Finalizing

Select Update to complete.

Select Cancel to disregard any changes.
5.6 Defining Targets

The next task is to decide on how much increase to the baseline is desired. A target is the desired level of performance of a performance measure at specified period of time. Sample targets for the above baselines might be:

- 90% of fourth graders are reading on grade level
- 30 minutes of individualized instruction is available for each fourth grader
- 4 reading assessments are given per year

5.6.1 Managing Actuals and Targets

To manage the Actuals and Targets for a particular Strategy, the following items need to be completed:

- A Strategy needs to be set for a perspective
- Goals need to be created and applied to a Strategy
- At least one measure needs to be attached to a Strategy

**Step 1: Edit Scorecard**

From the Select Scorecard page, click on Edit Scorecard

![Figure 29](image-url)
Step 2: Working with Actuals and Targets

An Actual is the level of performance during a given time period, while Targets are the desired level of performance on a measure by the end of the year.

When the page reloads, it will display the Actuals and Targets as numeric values.

Step 3: Finalizing

Select **Update** to complete.

Select **Cancel** to disregard any changes.
5.7 Defining Thresholds

Thresholds are the limits defined to show the appropriate indicator icons that provide a visual cue of current status of each measure.

The default values for lower threshold limit (L) and higher threshold limit (H) are set to 33 and 66 respectively.

The threshold limits are configurable.

If Current Status is C then, if C<=L then red indicator icon is shown, if C>L and C<=H then yellow indicator icon is shown and if C>H green indicator icon is shown.

![Figure 31](image_url)
6.0 Searching for Proven Practices

**Step 1:** Click “Find Proven Practices”

**Step 2:** Click “Continue”

**Step 3:** Use one of the 5 search criteria to find proven practices aligned to those criteria.

Start with a general search first. If you need to narrow your search, select additional criteria. The more criteria you choose, the more you are narrowing your search and there may be no records returned.
The five search methods are shown below:

1. **Search by Category** – You may click on the arrow to get a pop-up list of 8 major categories of school district processes. Every practice is aligned to one of these categories.

2. **Search by Balanced Scorecard Perspective** – By clicking a radial button, only practices aligned to that perspective will be included in the search. Every practice is aligned to one of the four perspectives.

3. **Search by Content Area** – You may click a content area for practices aligned to that area.

4. **Search by Stakeholder Group** – You may choose the stakeholders that are the primary recipient of the practice.

5. **Search by Proven Practice Description** – You may enter keywords or phrases that are contained in the practices' description.
6.1 Category Search

When a category is selected, the screen will refresh itself and provide a pop-up window to select a process within that category if requested. If a particular process is selected, a list of the sub-processes is displayed with check boxes to allow selection of one or more of the sub-processes. The search may be conducted for all practices aligned to that category, for all practices aligned to the selected process, or for all practices aligned to the checked sub-processes. Below is a sample of the sub-processes available for the Parent and Community Involvement category.

Step 4: Click “Search”
Step 5: Select the measures from any of the practices returned by checking its box, and then click “Add to cart”

Step 6: Add the selected measures to an existing scorecard or a new one.

The following is the list of selected Measures grouped by Proven Practices. Add more description to the Measures if needed.