

Balanced Scorecard – Example

Draft/Sample – may not accurately reflect business

Department Name: Organizational Effectiveness & Staff Development

Mission: To advance institutional performance by building individual, team, and organizational capability. We achieve this by providing learning and development opportunities for Yale University staff and organizational development and change management services to Yale University and its units, departments and workgroups.

Vision: We enable Yale to attract, develop, and retain high potential talent.

| Financial/Stewardship Perspective | | | | |
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| | Objectives | Measures | Targets | Initiatives |
| How can our department be financially responsible and take action to further the financial goals of the unit and University? | 1. Reduce training dollars spent each year | 1. Amount/\$ spent on external instructors | 1. Reduce spend by \$20,000 in first year and continue to see financial benefits of >\$20,000 each subsequent year | 1. Hire resource to teach 3 of external instructors' classes each year; additionally, give 1 class from all other external resources to each of existing employees |
| | 2. Improve retention | 2. Attrition of staff | 2. Reduce attrition by 5% FYXX | 2. Enrich career development resources for staff (1-on-1 coaching, resume review event, career development courses) |

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| Customer Perspective | | | | |
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| To achieve our vision, how should we appear to our (internal or external) customers? | Objectives | Measures | Targets | Initiatives |
| | 1. Meet the learning and development needs of staff in each course we teach | 1. Scores on evaluations | 1. Achieve an average score of 4.5 or greater for each training class | 1. Create a Training Community of Practice where all instructors come together to share best practices for learning knowledge and retention; hold trainers accountable for scores after each class |
| | 2. Increase manager collaboration on common challenges | 2. Attendance at special manager sessions | 2. Host >30 managers at quarterly sessions and have active participation and engagement at each event | 2. Create “Manager Chats”, a forum for managers to come together to share challenges, collaborate on solutions, and learn best practices |

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| Internal Business Process Perspective | | | | |
|---|---|---------------------------------------|--|--|
| | Objectives | Measures | Targets | Initiatives |
| To satisfy our customers (internal and external), what business processes must we excel at? | 1. Be more sustainable with our training materials | 1. Amount of paper used in each class | 1. Eliminate 90% of paper handed out in class (with the exception of classes with material from outside vendors) | 1. Move training evaluations from paper to Qualtrics and post unique QR code for participants to use to complete evaluations while in the classroom; any guides that were previously handed out in class can be emailed in advance as a pre-read and slides will no longer be printed for handouts |
| | 2. Establish a formal process for career coaching at Yale | 2. # of coaching agreements collected | 2. Obtain 100% of coaching agreements for each client served | 2. Communicate new process via coaching website and ensure coaching agreement forms are collected <i>before</i> coaching appointments are granted |

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| Learning and Growth/Organizational Capacity | | | | |
|--|---|---|---|--|
| To achieve our vision, how will we sustain our ability to change and improve? People, infrastructure, technology, and culture | Objectives | Measures | Targets | Initiatives |
| | 1. Increase the number of staff who have a completed IDP | 1.# of IDPs completed (HRGs to assess in each department) | 1. 80% of staff members in each department have a draft of their IDP and have met with their manager to discuss their development plan | 1. Increase advertising for IDPs (mention at the end of each training class, incorporate into materials for Managing at Yale Essentials class, have HRGs share at department/staff meetings) |
| | 2. Grow the number of managers who have participated in the Managing at Yale (MAY) curriculum | 2.% of managers in each department who have completed the curriculum within prescribed time in position | 2. 95% of managers participate in the MAY Essentials class within 3 months in position; 80% of managers participate in the Great Manager course within 6 months in position | 2. Create Manager Roadmap for HRGs to share with managers (instructing managers on which courses to take at what time); advertise MAY courses in New Employee Orientation |