



## Balanced Scorecard Initiative

### Implementing the AUB Institution-Wide BSC

## AUB Mission statement (1/2)

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AUB is a teaching- centered research university, convinced that excellence in teaching and research go hand-in-hand. Its mission is to enhance the education of primarily the people of the Middle East, to serve society through its education functions, and to participate in the advancement of knowledge. AUB bases its educational perspective and methods and its academic organization on the American model of higher education.

## AUB Mission statement (2/2)

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The University emphasizes scholarship that enables students to think for themselves, stresses academic excellence, and promotes high principles of character. It aims to produce men and women who not only are technically competent in their professional fields but who are life-long learners and who have breadth of vision, a sense of civic and moral responsibility, and devotion to the fundamental values of human life. The University believes in and encourages freedom of thought and expression. It expects, however, that this freedom will be enjoyed in a spirit of integrity and with a full sense of responsibility.

# AUB Vision statement

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AUB is a private institution for higher education, that attracts faculty, students and patients who seek excellence in research, education and medical services

# The Kaplan-Norton model (1/2)

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- To achieve our vision, we should continuously deliver our customers needs and their expectations
- To deliver continuously our customers needs and expectations, we should have effective and up-to-date internal processes
- To implement our internal processes successfully, our workforce should be competent and motivated
- To sustain all the above, we should be financially healthy

# The Kaplan-Norton model (2/2)

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- Therefore, the strategy is articulated through objectives that focus on:
  - Customers
  - Internal Processes
  - Learning and Growth (people)
  - Finances

...that are linked by cause-and-effect relationship

- And through measures, targets and initiatives related to those objectives

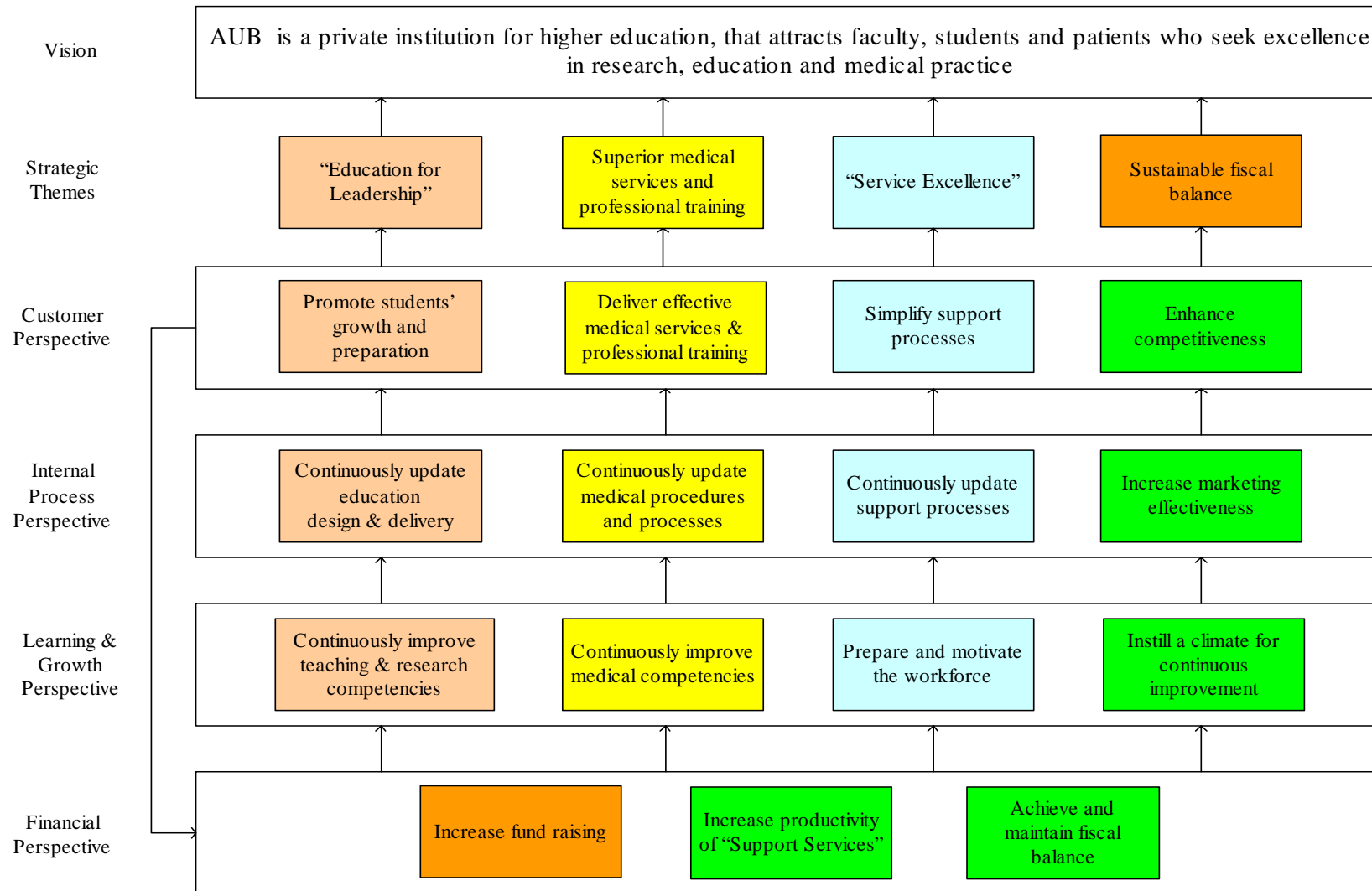
# Objectives, measures, targets and initiatives

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- Objectives: Describe the desired outcomes
- Measures (KPIs): The tools we use to indicate how well we are achieving our objectives
- Stretch Targets: Describe the desired value we would like the measure to reach within 3-5 years
- Initiatives: The actions we are planning to take in order to reach those targets

AMERICAN UNIVERSITY of BEIRUT  
Institution-wide Strategy Map

February 2005



# Example of Cause-and-Effect linkage

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## Objectives:

- Continuously update education design & delivery (Internal Processes)
- Continuously improve teaching & research competencies (Learning & Growth)

## Measures:

- Percent of course-sections using WebCT (IP1c2)
- Percent of instructional faculty members using WebCT (LG1e2)



# Implementing the Balanced Scorecard is to focus on ...

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- Mission/ Values/ Vision
- Objectives
- Measures
- Targets
- Initiatives

...during BSC Review Meetings and in  
between meetings

# Institution-wide BSC Review Meetings at AUB

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## The Purpose:

- Monitor the actual performance of the measures (against targets)
- Monitor the progress of strategic initiatives
- Discuss implications and resolve strategic issues

## The Tools:

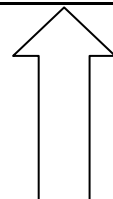
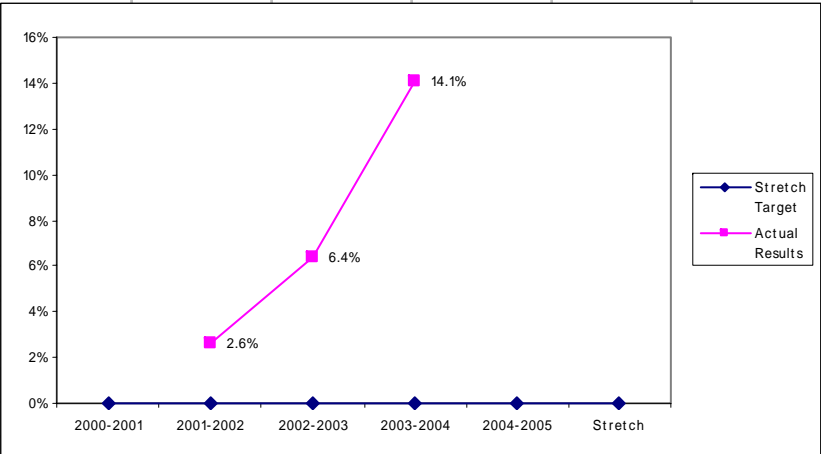
- A “Report Card” for each measure

## The Dates:

- December: For measures requiring completion of fiscal year
- March: For measures requiring completion of fall semester
- August: For measures requiring completion of spring semester
- All three: For measures requiring frequent reviews per year

## The Duration:

- 2 to 3 hours each meeting

<b>Perspective: Internal Processes</b>		Objective: Continuously update education design & delivery (IP1)																						
Measure: Percent of course sections using WebCT in fall semester																								
Measure Leader: Moueen Salameh		Performance Owner: Provost Heath																						
Management Review Frequency: A		Management Review Date: Mar																						
<b>Comments on performance of measure:</b>																								
Data Source: Academic Computing		Reference: IP1c2																						
<b>Calculation Method:</b> Total number of undergraduate course-sections using WebCT divided by total number of course-sections taken by undergraduate students		<b>Initiatives supporting this measure:</b>  <u>Initiative:</u> <u>Comments on progress of Initiative:</u>																						
 <table border="1"> <caption>Graph Data: Percent of course sections using WebCT</caption> <thead> <tr> <th>Year</th> <th>Actual Results</th> <th>Stretch Target</th> </tr> </thead> <tbody> <tr> <td>2000-2001</td> <td>0%</td> <td>0%</td> </tr> <tr> <td>2001-2002</td> <td>2.6%</td> <td>0%</td> </tr> <tr> <td>2002-2003</td> <td>6.4%</td> <td>0%</td> </tr> <tr> <td>2003-2004</td> <td>14.1%</td> <td>0%</td> </tr> <tr> <td>2004-2005</td> <td>-</td> <td>0%</td> </tr> <tr> <td>Stretch</td> <td>-</td> <td>0%</td> </tr> </tbody> </table>				Year	Actual Results	Stretch Target	2000-2001	0%	0%	2001-2002	2.6%	0%	2002-2003	6.4%	0%	2003-2004	14.1%	0%	2004-2005	-	0%	Stretch	-	0%
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# Generic membership of the BSC Implementation Team

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- Work Unit Manager
- Performance Owner (one per Measure)
- Measure Leader (one per Measure)
- BSC Coordinator (one per Work Unit)

# Implementation Team of The AUB Institution-wide BSC

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- Work Unit Manager: President Waterbury
- Performance Owners: VPs
- BSC Coordinator: Andre Nahas
- Measure Leaders:
  - Karma El-Hassan
  - Mahmoud Harb
  - Daad Timani
  - Najwa Kais
  - Soha Homeidan
  - Fadia Homeidan
  - Salim Kanaan
  - Moueen Salameh
  - Nadia Saimua
  - Vartan Vartanian
  - Nizar Jawhar
  - Boushra Rahhal
  - Salim Kiblawi
  - Nagib Choueiri
  - George Bitar-Ghanem
  - Mary Jaber
  - Howard Ray
  - Iman Wakim
  - Samir Kfoury

# Role of the Work Unit Manager

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- Approves the strategy
- Issues the agenda of the BSC Review Meetings
- Chairs the BSC Review Meetings
- Approves corrective actions as required
- Reviews the minutes of the BSC Review Meetings
- Identifies the BSC Coordinator for the Work Unit

# Role of the Performance Owner

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- Reports on performance of his/her measures during the BSC Review Meetings
- Advocates changes in strategy, initiatives and targets
- Identifies the Measure Leaders for the measures that he/she is responsible for
- Reviews the report card prepared by the Measure Leaders

# Role of the Measure Leader

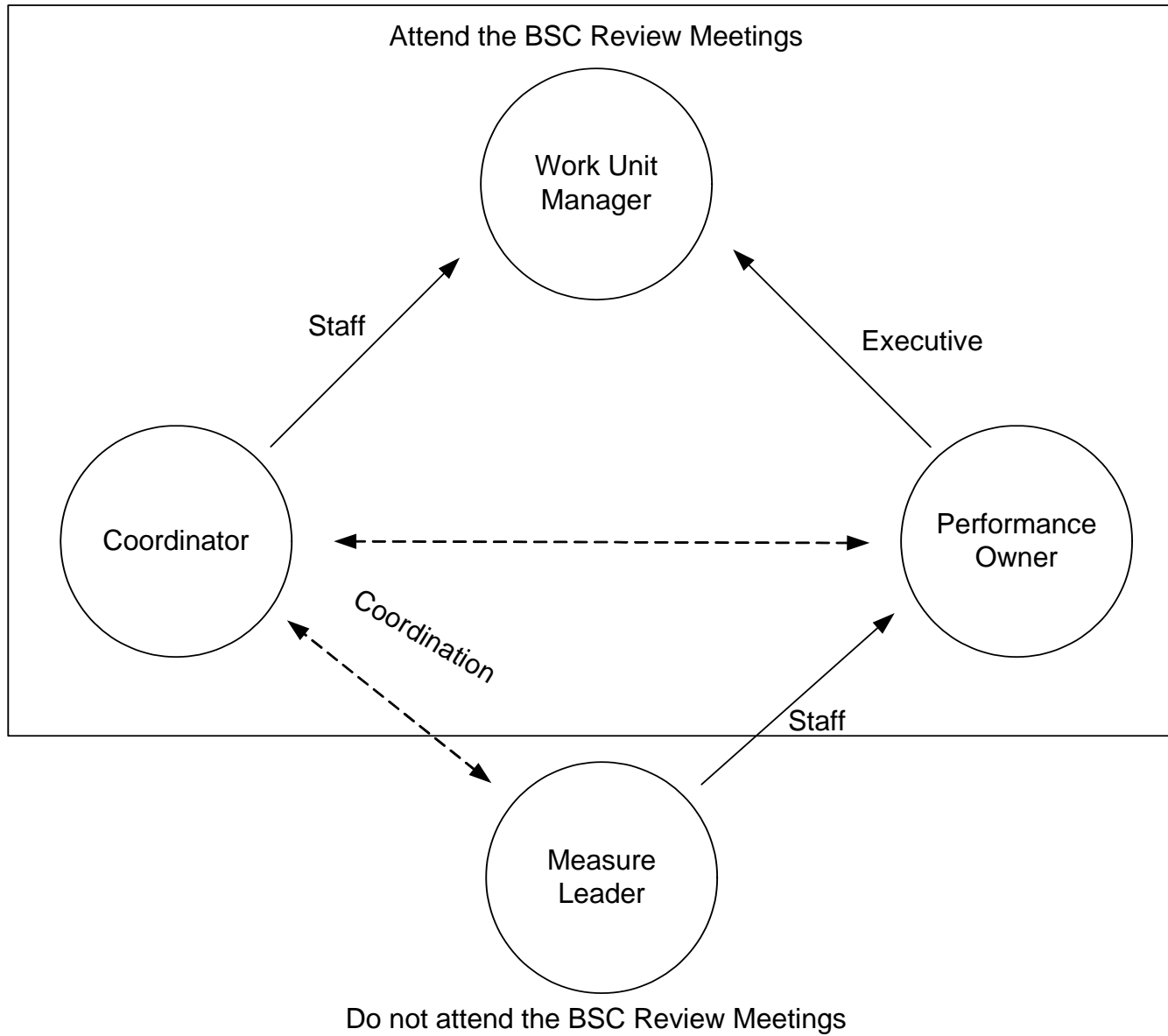
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- Finalizes the measure details (e.g. formulae, data sources, frequency of update, method of calculation, etc.)
- Prepares the report cards for measures assigned
- Briefs the Performance Owners prior to the BSC Review Meetings
- Suggests revised targets and initiatives when necessary

# Role of the BSC Coordinator

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- Keeps the process of implementing and updating the BSC moving forward
- Coordinates all activities related to the BSC Review Meetings with the work unit manager, the performance owners and the measure leaders
- Drafts the agenda of the BSC Review Meetings
- Drafts the minutes of the BSC Review Meetings



# Initial Presentations by Performance Owners- VPs Meetings (1/2)

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## The Purpose:

- VPs to take ownership of the Institution-Wide BSC measures
- Consolidate the work done by the BSC Coordinator and the Measure Leaders
- Identify major gaps in the objectives and/or measures
- Complete any element missing from the report cards, e.g.:
  - Calculation method
  - Targets
  - Initiatives
  - Management Review frequency and dates

## The Tools:

- A “Report Card” for each measure

# Initial Presentations by Performance Owners- VPs Meetings (2/2)

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## Performance Owners' Initial Presentations:

- February 12, 2004:
  - Provost
- March 5, 2004:
  - VP Medical Affairs
- April 6, 2004:
  - VP Administration
  - VP Finance
  - VP Development
  - VP Regional External Program

## Meeting of Coordinator with Measure Leaders:

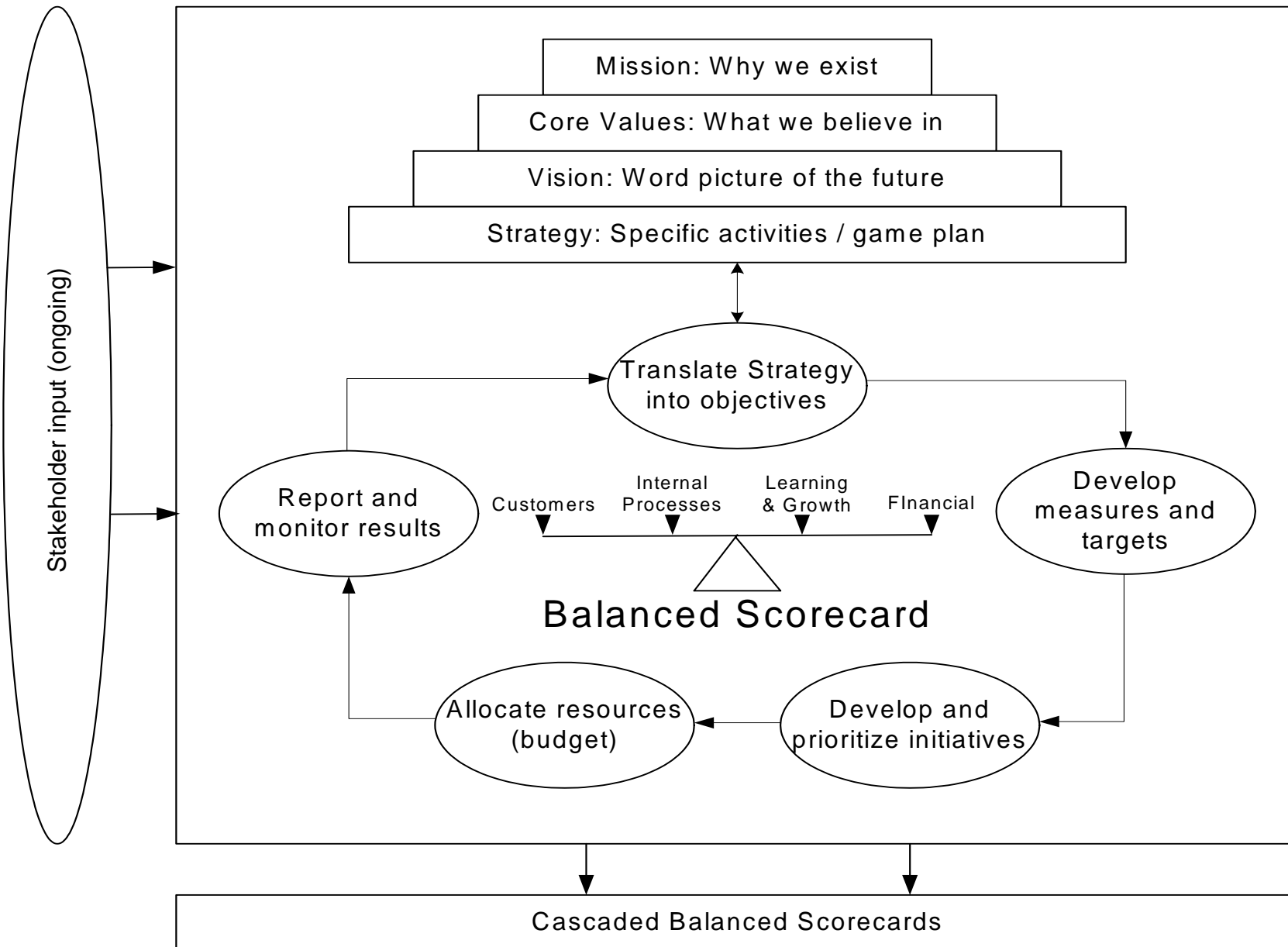
- January 21, 2004:

# Tips and recommendations

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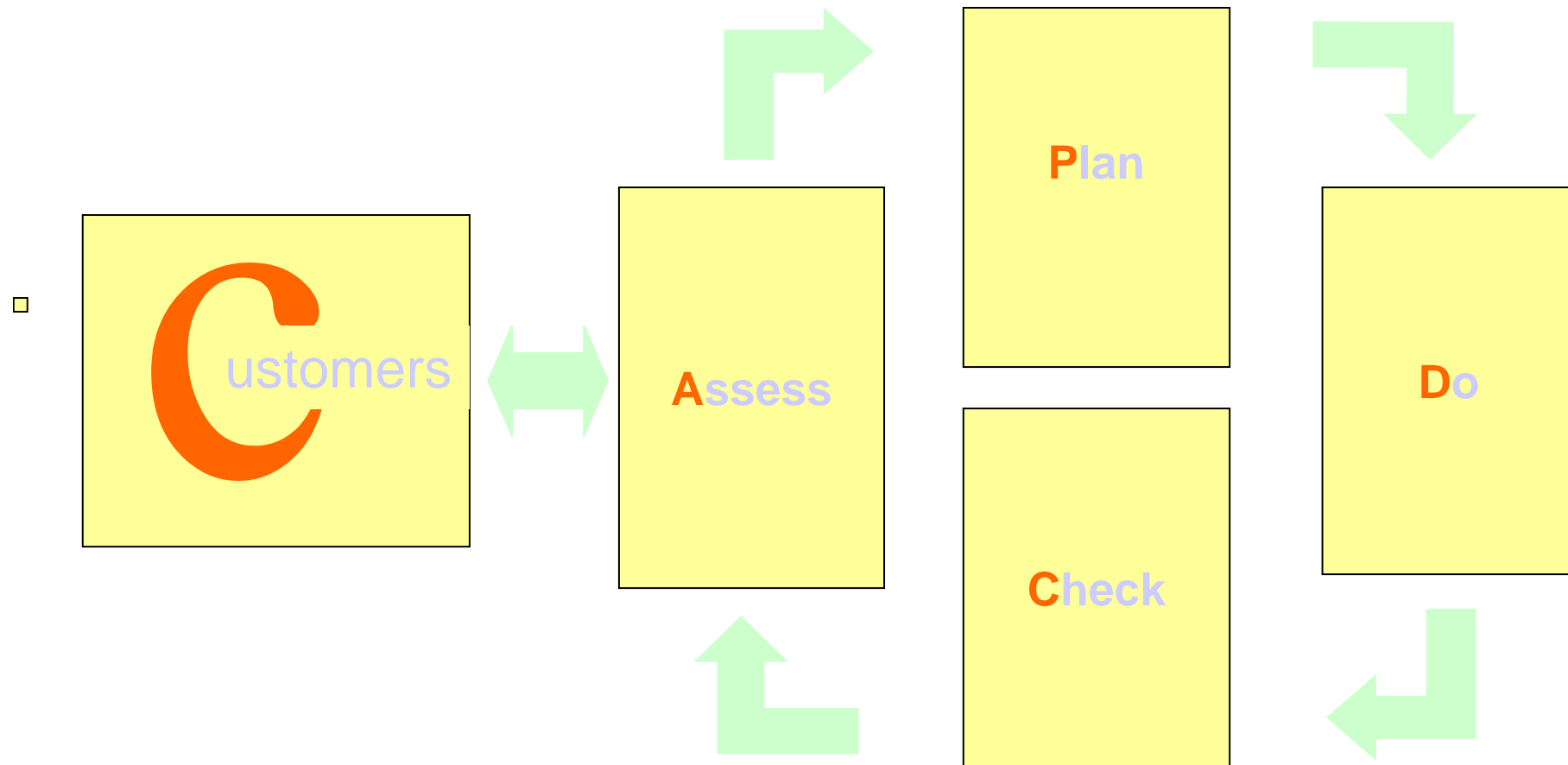
- Don't look for perfection. Momentum is critical
- Over a period of time, decrease the number of measures
- Make participation in the BSC review meetings mandatory for all team members
- Complete and distribute report cards one week prior to meeting
- Focus discussions on problem areas and strategic issues
- Discussions should not drift to operational minutiae
- Share some of the outcomes from these meetings with a larger audience

# Performance Management Map



# Quality Management processes

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# BSC Roll-out Plan

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- Assign a “Project Manager”
- Review/Revise/Complete the “Mission” statement
- Develop the “Vision” statement
- Assign the “BSC Coordinator”
- Identify the “Strategic Themes”
- Identify the “Strategic Objectives”
- Draw the “Strategy Map”
- Develop the “Measures”
- Identify “Performance Owners” and “Measure Leaders”
- Obtain “Senior Management” approval

# BSC Roll-out Plan

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- Identify “Stakeholders”
- Obtain stakeholders’ buy-in
- Collect “actual” data for each measure
- Set “Targets” for each measure
- Identify “Initiatives” for each objective
- Obtain senior management approval (targets & initiatives)
- Develop reporting system (Who, where, what, when)
- Hold regular “Management Review Meetings”