Using a Cascading Scorecard System to Track Performance at the Organizational, Unit, and Program Levels

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Wisconsin’s Polytechnic University
• 2001 Malcolm Baldrige National Quality Award Recipient
• Founded in 1891
• Located in Menomonie, WI
• Polytechnic University
• Career Focused Programs
• 97% Job Placement Rate
• Serves over 11,000 students annually
• Vibrant wireless laptop campus

Today’s Goals
Share how we use data:
• To track organizational performance (A)
• To ensure that all faculty/staff are involved in tracking progress (D)
• To ensure actions are taken to accomplish the strategic plan (L)
• To ensure review and integration at all levels of the organization (I)
Background
• Item 4.1 (*Measurement, Analysis and Improvement of Organizational Performance*) was our lowest-scoring category in 2001
• Needed to work on deployment and integration
• Presentation focuses on what our performance measurement system looks like now and future plans
• Still a work in progress

What we had in 2001
• 5 year strategic plans (A)
• Performance indicators identified for each plan (A)
• Focused set of metrics (A)
• Progress reviewed regularly (A/L)
• Action items to achieve targets (L)

Concerns in 2001
• Action items primarily at the university level
• Progress not systematically being reviewed by non-leadership groups (D)
• Individual units didn’t always understand how they fit in (D)
• Limited integration into processes below leadership level (I)
What We Have Now

- Action items primarily at the university level
- Progress not systematically being reviewed by non-leadership groups (D)
- Individual units didn’t always understand how they fit in (D)
- Limited integration into processes below leadership level (I)
- Action items at all levels of the organization
- Progress reviewed at all levels of the organization
- Cascading scorecard so units know how they are performing
- Integration into unit planning, program review, support unit review processes

Cascading Scorecard

- Framework for the Cascading Scorecard
  - Combined data sources into one platform
  - Interactive dashboard
  - Drilldown to three levels
    - University/Organizational level
    - College/Unit level
    - Department/Program level
  - Additional segmentation
  - Helpful for end users
  - User friendly
  - Accessible to all users

Launch Page for the cascading scorecard

- Link to all metrics
- Link to specific metric
Cascading Scorecard

University/Organization Level

College/Unit Level

Program/Department Level

Key segments

Cascading Scorecard

Cascading Scorecard

Cascading Scorecard
Cascading Scorecard

• Future considerations
  – Incorporating trend and comparison data (Jan launch)
  – Continuous Improvement log
  – Some metrics need to be refined
  – Systematically identifying best practices
  – Bringing the metrics to an individual level
  – Balancing the request for more information with keeping it simple

Integration & Learning

• Integration into unit planning, program review, support unit review processes
Program/Department

• Program Review Process
  – Owner: Faculty and Academic Staff
  – Three Components:
    • Self-study/narrative
    • Surveys
    • Rubric
  – Cycle: Four-years
  – Reviewed by Planning and Review Committee (PRC)

Stakeholder feedback
Performance Indicators
Narrative
Educational Support Unit Review

• Support Unit Review Process
  – Owner: Faculty and Academic Staff
  – Four Components:
    • Self-study/narrative
    • Feedback form
    • Performance Indicators
    • Unit Action Plan
  – Cycle: Annual
  – Reviewed by Educational Support Unit Review Committee (ESURC)
Unit/College

- Unit/College Review Process
  - Owner: Division leaders
  - Two Components:
    - Unit/College Action Plan
    - Performance Indicators
  - Cycle: Annual
  - Reviewed by Strategic Planning Group (SPG)

University/Organization

- University Review Process
  - Owner: University Action Plan Leaders
  - Two Components:
    - University Action Plans
    - Performance Indicators
  - Cycle: Annual
  - Reviewed by Strategic Planning Group (SPG)

Learning

- Review committee membership is intentional to foster communication and integration of priorities from the local to the overall organization level
- Local action plan initiatives roll into larger-scope action plans
Integrated Initiatives

• An enrollment target is negotiated at the program-level, monitored through the PRC evaluation, part of the college/unit action plan and rolled into the university-wide enrollment targets

Integrated Initiatives cont’d

• University-Wide retention target established
• Review of data through SPG indicated that we needed to reach out to more than the traditionally at-risk students
• University action plan to implement MAPworks

Integrated Initiative cont’d

• University action plan to implement MAPworks
  – Started with first-year students
  – Successful, so now being piloted with second-year students
• Unit-level action plan incorporates MAPworks data
  – Unit-level early alert system
• Retention levels second highest in history and climbing