

MEASURING WHAT MATTERS:

A design thinking approach to balanced scorecards

Catholic Charities USA

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AGENDA

1. Balanced scorecard background
2. Strategic objectives
3. Stakeholders and their values
4. Metrics
5. Voting and deliberation
6. Next steps



1. Why should my scorecard balance?

Background on the balanced scorecard approach

Balanced Scorecard

Four General Categories:

Finance

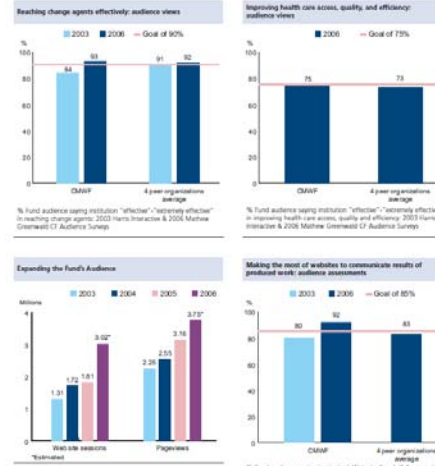
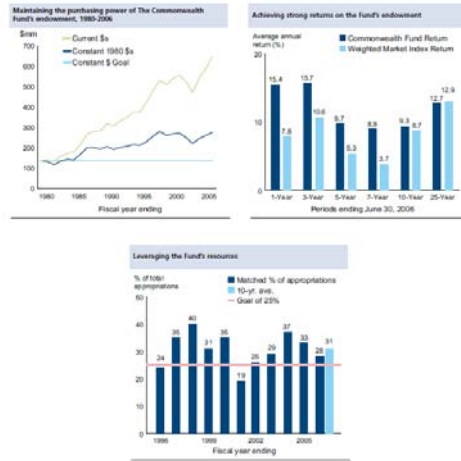
Audience/Impact
(Customer/ Context)

Internal Process
(Operations/Efficiency/
Management)

Learning & Growth
(HR/Org. Capacity/Staff
Development)

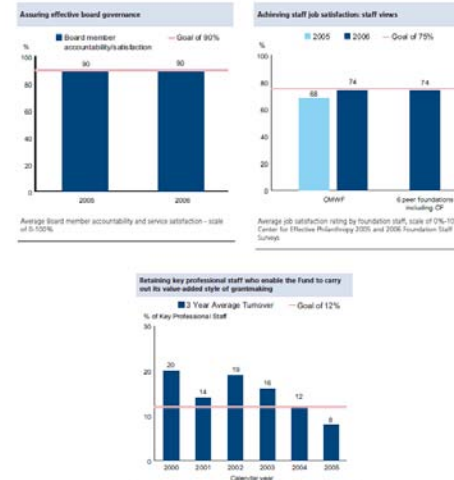
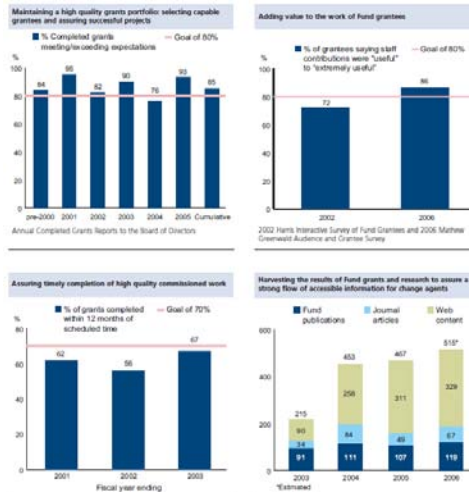
Balanced Scorecard

Finance



Audience/
Impact

Internal
Process



Learning &
Growth

Balanced Scorecard



Yes- there is even an app for it!



"BsC-i: Balanced Scorecard for NonProfits Organizations"

Your app to Control NPOorganizations, like NGO's, Universities, Public Administration, Sports Clubs,...

- Available for iPad in English, Spanish and French
- Price: 19,99 € / \$24,99
- Business Category





2. Strategic Objectives

What are we measuring and why does it matter?

Strategic objectives

- Purpose: convey the goal or objective of each category: what should the various metrics that fall within the category be disclosing?
- These should be aligned with the organization's goals and objectives

Strategic objective examples

FINANCE

To maintain finances which support growth and expansion while maintaining a healthy infrastructure.

IMPACT/AUDIENCE

To provide supportive services which help men, women, and children in need thrive today and be equipped to thrive tomorrow.

INTERNAL PROCESS

To create and maintain effective, compliant, and well-integrated systems that meet stakeholders' needs.

LEARNING AND GROWTH

To attract and develop staff and board aligned with our guiding values and positioned to advance the mission.

Strategic objectives

- Take a few minutes to draft **the** strategic objective for your organization for the quadrant on your table.



3. Stakeholders and their values

Who do we care about and what do they care about?

Who are your stakeholders?

Internal

- Board Chair
- Audit Committee Chair
- Program Committee Chair
- General Board Member
- CEO
- Director
- Staff Member

External

- Client
- Partner Organization
- Politician
- Nonprofit Evaluators (eg: Charity Watchdog, Charities Review Council)
- General Public

Who are your stakeholders?

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What do your stakeholders care about?

Board Chair:

- _____
- _____
- _____



4. Metrics, metrics, everywhere

Brainstorming the universe of potential metrics

Qualities of good metrics

- Objective and unbiased
- Statistically reliable but inexpensive to collect
- Qualitative and quantitative in nature
- Robust, ensuring things that count most heavily in the association's performance
- Discriminating: small changes in them are meaningful

Brainstorming your metrics

- Take 5 minutes to come up with as many metrics as possible that pertain to the quadrant at your table.
- Write each idea on a sticky note
- When you have written all of your ideas, place them on your table's scorecard..



5. Let the voting begin!

Put on your stakeholder hats and start picking favorites!

Rounds of voting

Vote for 4 metrics each round of voting using the colored dots at your place.

1. Stakeholder lens
2. Ease of collection lens
3. Mission-relevance lens

Rounds of voting

- Identify the top metrics (based on total number of votes received) at your table.
- Share with the larger group which metrics received the most votes or other interesting things you noticed throughout the process.



6. Next steps

Please..... try this at home!

Next steps to complete your scorecard

Compile results based on responses

LEARNING AND GROWTH	Internal Stakeholders	Ease of Collecting Data	Mission Relevance	TOTAL
Employee satisfaction	7	6	2	15
Board satisfaction/engagement/retention	3	5	0	8
Staff diversity	1	3	2	6
Impact of asset and wealth strategies	2	0	4	6
Staff turnover/retention	1	3	0	4
Lessons learned	0	0	3	3
Servant leadership by all	0	0	0	0
Compilation of best practices	0	0	0	0

Next steps to complete your scorecard

- Complete these exercises with your management team and create a draft scorecard with the results
- Identify the following for each metric:
 - Commonly agreed upon definition
 - Targets or acceptable ranges
 - Best way to visualize (chart, graph, checklist, other?)
- Add the visuals to your draft scorecard
- Review with the board- change where needed
- Implement and continue to tweak



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