

THE BALANCED SCORECARD APPROACH TO PLANNING, ASSESSMENT AND PERFORMANCE MANAGEMENT

The Office of Administration adopted the balanced scorecard approach to help us develop our goals and assessment tools.¹ This approach frames our planning and assessment in four important perspectives:



No one perspective alone provides a balanced approach: the financial perspective looks backward; the customer perspective does not account for constraints or controls; internal business perspective helps us focus on process improvements; and innovation and learning perspective includes employee capabilities, use of relevant technology and motivation and alignment. These balanced multi-dimensional measures communicate the complex tradeoffs inherent in the planning process.

Based on the four quadrants of the balance scorecard. OOA has developed the following success factors, which in turn aligns with campus strategic goals and objectives.

Financial Goals

1. We ensure UC Davis financial integrity and demonstrate fiduciary responsibility for capital and financial assets throughout the campus.
2. We deliver our services in an efficient and cost-effective manner. The value we create exceeds the cost of creating it.
3. We ensure delivery of quality services in support of the UC Davis mission by facilitating the generation of revenue and protection of assets.

Customer Satisfaction Goals

1. Our customers are consistently satisfied with the products and services provided by Office of Administration departments:
2. Our stakeholders recognize the value of our contribution to the UC Davis mission (the quality and efficiency of operations and ethical exercise of fiduciary responsibility).

¹ Kaplan, Robert and Norton, David "The Balanced Scorecard: Translating Strategy into Action" Harvard Business School Press, 1996

Internal Business Goals

1. We develop and implement demonstrably clear policies, simple procedures and efficient work processes.
2. We anticipate the future and we design and improve our programs and services in ways that ensure future success.
3. Accountability underlies everything we do.
4. We leverage our skills and resources, both collectively and individually, in direct support of the UC Davis academic mission.

Innovation and Learning Goals

1. We create a workplace that fosters teamwork, integrity, professionalism, pride and trust.
2. We attract, retain and enable a highly skilled, diverse workforce capable of successfully delivering our products and services to our customers.
3. We achieve high degrees on innovation, efficiency, effectiveness and quality of service in every area of our business through the utilization of information technology.
4. We encourage and reward enterprising behaviors and actions throughout the campus.
5. We improve continuously.