

Balanced Scorecard - Strategic Planning Rollout Briefing

University Council
April 11, 2019

University of Houston  Clear Lake

Outline

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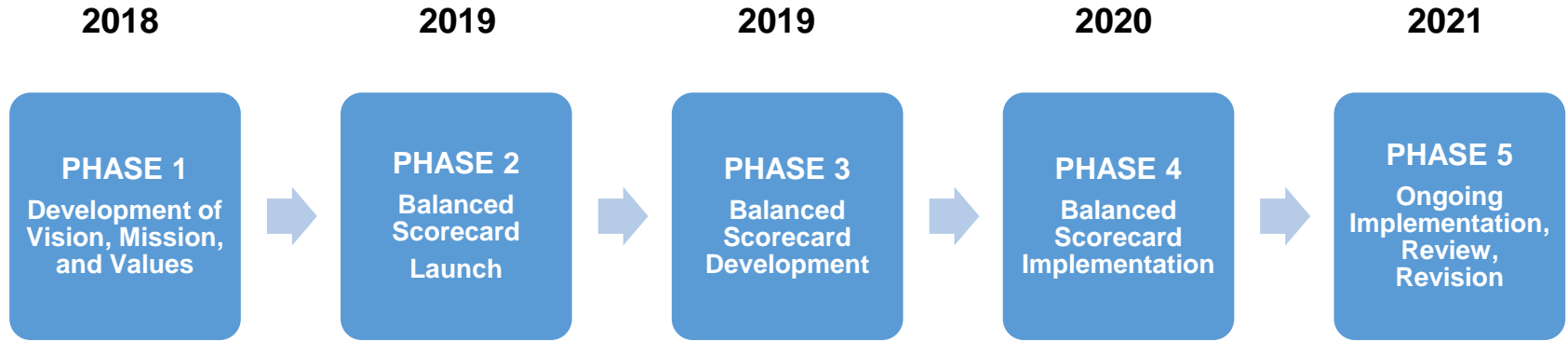


Our Overarching Goal

- To provide the UHCL community with a new vision, mission, and core values which can be actualized through the development and execution of a 5-7 year strategic plan
- This strategic plan should drive our business model and position UHCL for success over the next decade
- Our Strategic plan and planning process must include specific design characteristics:
 - Transparency
 - Based on internal and external input
 - Is sustainable
 - Engaging every employee
 - Engage our community
 - Can be described visually
 - Aligns every employee with the strategic plan
 - Makes clear our identity, purpose, and plan forward



Strategic Planning Major Phases



Where We Have Been

- Fall of 2017**
 - Vision Mission Values Taskforce (VMVTF) was formed
- Spring 2018**
 - VMVTF met weekly (8 weeks) and developed an initial draft of UHCL's new vision, mission, and core values
- Summer 2018**
 - Draft vision, mission, and values were reviewed (via web survey) by faculty, staff, alumni, community partners, and students
 - Revised draft mission, values, and values were generated
- Fall 2018**
 - Balanced Scorecard Institute presented initial proposal and overview of proposed approach
 - Revised vision, mission, and values vetted with multiple constituencies



Where We Have Been (cont.)

Spring 2019

- Vision, mission, and values approved by University Council, pending approval by Board of Regents and Texas Higher Education Coordinating Board
- Committees, Teams, and Advisory Board proposed
- Contract with Balanced Scorecard Institute is executed
- UHCL IT personnel developing a plan to use TaskStream to implement the strategic plan reporting and tracking
- Rollout plan is developed for next several years

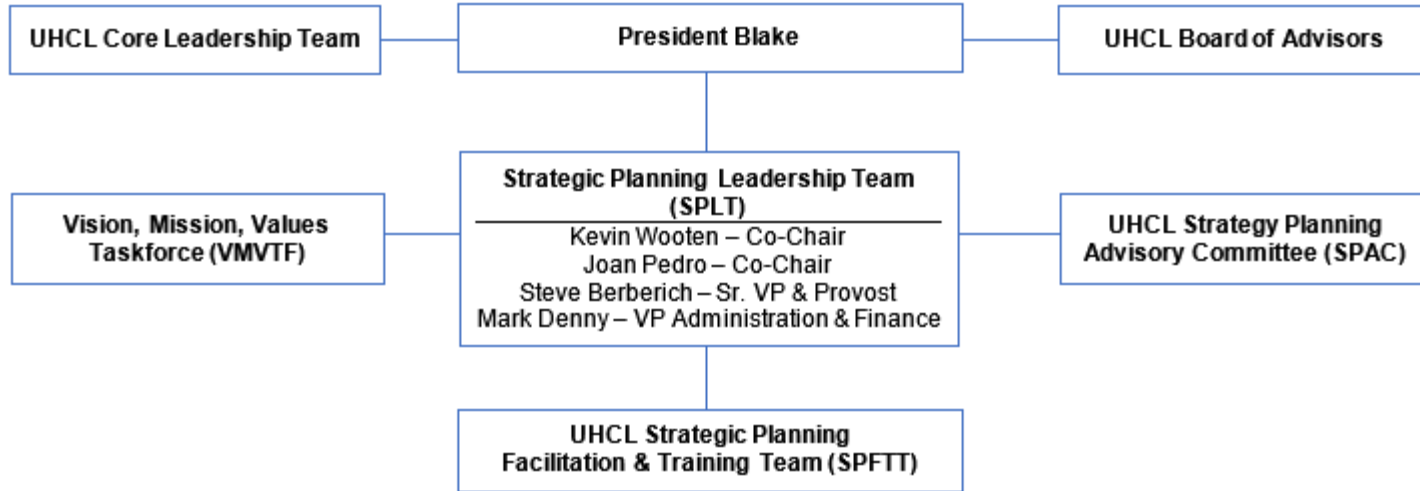


Where We Are Now (Today)

- Planning to use the Balanced Scorecard Institute to kick-start the process and to train UHCL personnel to implement specific processes and programmatic techniques
- Committees and Advisory Boards Formed
 - UHCL Strategic Planning Advisory Committee (internal constituents)
 - UHCL Strategic Planning Facilitation and Training Team
- UHCL Board of Advisors (external constituents) is being formed – use of industry sector specific members



Strategic Planning Structure for UHCL



Overview to Balanced Scorecard Process

- Has components of traditional strategic planning
- Incorporates processes – our desired design characteristics
- Important – we will be trained, but we will own and drive the process

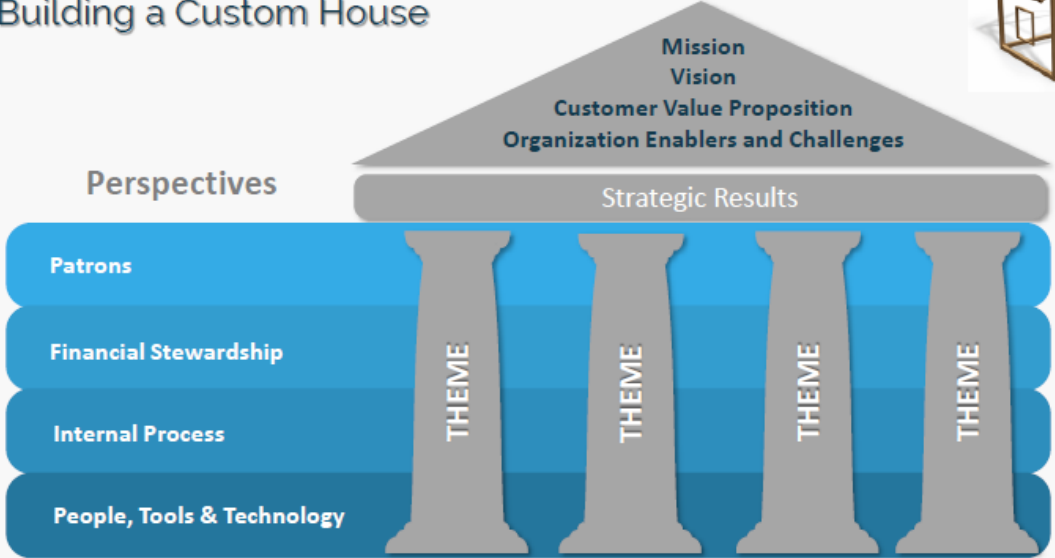


Figure 1: Generic Planning and Management System



How do you build a BSC?

Building a Strategic Plan is like Building a Custom House



1-Page Summary of Strategic Plan

Vision:	Be a world-class model for a successful urban community			
Mission:	Provide effective and fiscally responsible services in a manner that promotes high standards for community life			
Strategic Themes:	Government Reform	Nurturing Children and Families	Public Safety	Economic Abundance
Strategic Results:	Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, physical and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.
Strategic Objectives and Strategy Map		Measures	Targets	Initiatives
Constituent/ Stakeholder		• Livability satisfaction score	• >90% this year	<ul style="list-style-type: none"> • Green Space program • New business startup program • Community engage committee • Partnering program
		• Program satisfaction score	• >85% this year	
Financial Stewardship		• Per capita service utilization	• 65% this year	<ul style="list-style-type: none"> • Simplify tax payments • Asset resale program • Energy savings program
		• Business permits and licenses	• ↑9.5% each quarter	
Business Processes		• Per capita income	• ↑3% this year	<ul style="list-style-type: none"> • Partner recruitment program • City marketing program • Satisfaction surveys
		• Tourism revenue	• ↑6% this year	
Organizational Capacity		• Controllable expenses	• ↓5% this year	<ul style="list-style-type: none"> • Customer service training • Individual development plans • Program evaluation process
		• Asset value	• ↑8% this year	
		• Strategic projects on time and budget	• 95% this year	
		• Index of program results	• 85% this year	
		• Shared systems	• 35% this period; 50% this year	
		• Response time changes	• ↑5% this period	
		• Audit score of communication effectiveness	• >90% this period	
		• Recruitment effectiveness	• > 80% this period	
		• Retention effectiveness	• 92% this year	
		• Training effectiveness	• >93% this period	
		• Employees use of appropriate technology	• ↑45%	
• Integrity-Based Leadership • Ethics • Accountability • Commitment to Excellence • Citizen-Centered • Mutual Respect				



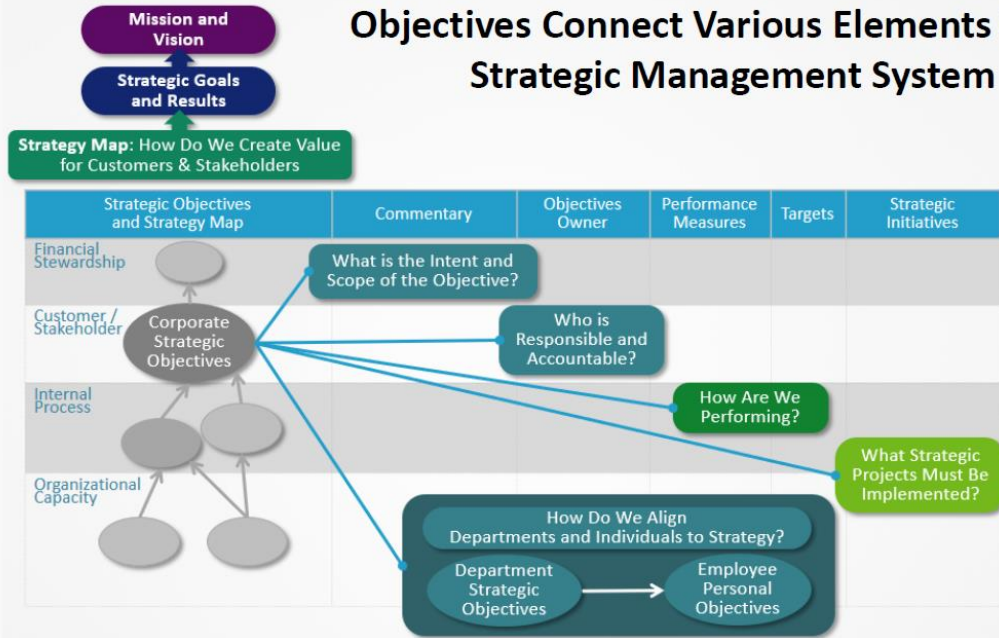
Why an Integrated System with BSC?

Align the Organization to the Vision, Mission & Strategy



How do you build a BSC?

Objectives Connect Various Elements Of The Strategic Management System



How Do We Create a Planning Culture?

- Get behind the plan – experiment – make your voice heard
- Our leadership support
- Our change agents – UHCL Strategic Planning Facilitation and Training Team
 - Consists of 23, administration and faculty
 - Will be provided 1-week certification training in September
 - Will be responsible for “driving” BSC to 2nd and 3rd institutional teams
 - Will be awarded certification status by “The George Washington University”



Where We Are Going

SPRING 2019

Activity	Date
1. Invitations for Participation in: a) UHCL Board of Advisors b) UHCL Strategic Planning Advisory Committee c) UHCL Strategic Planning Facilitation and Training Team	Week of April 1
2. Roll-out Plan Presentation to Core Leadership Team	April 1
3. Roll-out Plan Presentation to University Council	April 11
4. Balanced Scorecard Institute Communications Workshop (select officers and MARCOM develop communications strategy and schedule)	April 12 (1 full day)
5. Balanced Scorecard Institute Facilitated Environmental Scan (Interviews and Questionnaires)	April 15-26



Where We Are Going

SPRING 2019

Activity	Date
6. UHCL Internal Strategic Themes and Great Ideas Campus Forums	Week of April 22 (5-6 theme-based all-University structured meetings)
7. UHCL Board of Advisors Retreat	May (TBA) External stakeholders
8. Balanced Scorecard Institute Facilitated Strategic Foundations (select officers and others constituting the Strategic Management Team) crystalize vision, mission, values, competition analysis, formalize values propositions, develop and define initial strategic themes)	May 9-10 (2 full-day workshops)
9. Presentation to UHCL Strategic Planning Advisory Committee (review of work and feedback)	Week of May 13



Where We Are Going

SUMMER 2019

Activity	Date
1. Rollout of UHCL Initial Strategy House	June 1 – July 31
2. Refinement of Initial Strategic Themes and High-Level Measures	June 1 – July 31



Where We Are Going

FALL 2019	
Activity	Date
1. Balanced Scorecard Institute Facilitated Strategic Theme Team Workshop (4-5 theme-specific (e.g., Excellence in Education) workshops for select subject matter expert teams to refine themes and overall measures)	Week of September 2
2. Updates and Review University Council	September 12
3. Communicate to University on Progress Made	September 16
4. Balanced Scorecard Institute Facilitated Workshop (Bootcamp) (21 UHCL faculty to be certified as Balanced Scorecard Professionals to facilitate strategy implementation)	September 23-27
5. Balanced Scorecard Institute Facilitated Strategy Development Part 1 Workshop (Strategic Management Team develops overall strategic objectives and strategy map)	Week of October 1 (2-day workshop)
6. Communicate to University on Progress Made	Week of October 7



Where We Are Going

FALL 2019

Activity	Date
7. Balanced Scorecard Institute Facilitated Strategic Objective Overview Workshop (select owners of 10-16 overall strategic objectives develop prioritized initiatives and refined measures/KPIs)	Week of November 4 (2-day workshop)
8. Balanced Scorecard Institute Facilitated Strategy Development Part 2 Workshop (strategic objective owners and Strategic Management Team review all strategic objectives, strategic initiatives, refine measures and KPIs, refine strategy map)	Week of November 11 (1-day workshop)
9. Review and Feedback of Complete Strategy Map, Objectives, Initiatives, and Measures by Strategic Advisory Committees and Provide Final Feedback	Week of November 18
10. Communication of Tier 1 Strategy to University Community – University-Wide Meetings by Dr. Blake and Core Leadership	Week of December 1 (2 one-hour sessions)
11. Presentation to University Council, Faculty Senate	December – TBA

Upcoming Events/Tasks

April 12

- BSCI Facilitated Communication Workshop
 - MARCOM and BSCI representative, Strategic Planning Leadership Team, select officers
 - Focus on messaging, internal and external communications
 - Web presence
 - Overall communication strategy



Upcoming Events/Tasks

Week of April 15

- BSCI Facilitated Environmental Scan to Prepare for Foundations Workshop
May 10
 - Assessment of planning culture
 - SWOT
 - Assessment of strategic maturity
 - Competitive analysis
 - Strategic gap analysis
 - Select phone interviews with select leadership
 - Survey of all (Core Leadership, Strategic Planning Advisory Committee, SGA Leadership, SSA Leadership, Faculty, Senate Leadership)



Upcoming Events/Tasks

Week of April 22

- All University Strategic Themes and Great Ideas Forum
 - 2-hour facilitated (by Strategic Planning Leadership Team and others) meeting to identify high-level topics that university community wants to be considered for the strategic plan
 - 5 topic areas (teaching, campus life, business operations, etc.)
 - Academic Excellence
 - Student Experience
 - Sustainable Financial Resources and Alignment
 - Partnership with Community
 - Human Capital and Service-Based Culture
 - Current schedule 4/23, 4/25, 4/30 (5 meetings at CL, 1 meeting at PL)
 - Meetings will be at 1:00 pm and 4:00 pm



Upcoming Events/Tasks

May (TBA)

- UHCL Board of Advisors Retreat
 - Introduction of vision, mission, and values statement
 - Overview of our strategic planning process
 - Introduction to Balanced Scorecard
 - Review of our potential strategic themes
 - Discussion of niche and strategic positions



Upcoming Events/Tasks

May 9-10

- BSCI Facilitated Strategic Foundations Workshop (Core Leadership Team and Select Officers)
 - Refinement of strategic position
 - Develop value propositions
 - Develop competitive analysis
 - Define 4-5 strategic themes for UHCL Strategy House

May 13

- Presentation to UHCL Planning Advisory Committee
 - Feedback on work thus far
 - Articulate next steps
 - Review of summer activities



Famous Quotes on Strategy, Planning, and Strategy Execution

“Plan for the future because that’s where you are going to spend the rest of your life.”

Mark Twain

“However beautiful the strategy, you should occasionally look at the results.”

Sir Winston Churchill



Appendix

Approved Vision, Mission, and Core Values



Vision

The University of Houston-Clear Lake will lead as a learner-centered university dedicated to achieving national prominence in transformative education grounded in creative activities, innovative research, and community partnerships that serve regional, state, and global locations.

UHCL launches your future!



Mission

The University of Houston-Clear Lake places its highest priority on serving a diverse body of students in every aspect of their university experience. UHCL's teacher scholars provide high-quality, student-centered undergraduate and graduate programs that prepare students to thrive in a competitive workplace and to make meaningful contributions to their communities. UHCL fosters critical thinking and lifelong learning through a strong legacy of vibrant community partnerships complementing its historical focus on teaching, research, creative activity, and service.



Values

Proposed UHCL Core Value	Description
Learner Focused (1)	<p>UHCL is committed to maintaining and building strong degree plans that foster creativity and critical thinking. We are invested in our students and are committed to their growth, development, and transformation.</p> <p>Impact: Inspire individuals to grow to their fullest potential</p>
Transformation (2)	<p>UHCL empowers individuals to learn, grow, and develop as leaders and contributors. We support, and foster leadership and collaboration among students, faculty, and staff.</p> <p>Impact: Forge Visionary leaders who are agents of change in their fields.</p>
Innovation (3)	<p>UHCL cultivates fearless imagination when creating new programs, teaching methods, and research opportunities that prepare students to meet the challenges of changing global economy. We are attuned to social, economic and environmental changes and take timely action to respond to them.</p> <p>Impact: Deliver the solutions to challenges of today and tomorrow.</p>



Values

Proposed UHCL Core Value	Description
Diversity and Inclusion (4)	<p>UHCL embraces inclusion and cultivates diversity at all levels of the institution. We celebrate our status as a Hispanic-serving institution. We welcome students, staff, faculty, and partners from different nationalities, races, ethnicities, ages, religions, genders, sexual orientations, and physical abilities into our family and values identity through the lens of intersectionality.</p> <p>Impact: Create an inclusive community that develops well-rounded individuals who contribute to the global society.</p>
Resilience (5)	<p>UHCL embodies perseverance, passion, commitment, resolve and grit to bring positive change to the university and community.</p> <p>Impact: Evolve as a community to persevere through challenges and adversity.</p>
Service (6)	<p>UHCL is committed to community values, partnerships and collaboration. We create a service culture among faculty, staff, and students. UHCL maintains strong sustainable relationships by engaging various stakeholders to achieve mutual goals and objectives.</p> <p>Impact: Develop leaders who foster the growth and wellbeing of the communities they serve</p>



Values

Proposed UHCL Core Value	Description
Integrity (7)	<p>UHCL fosters honesty and trust among all internal and external constituents. We are committed to our values and being accountable to our constituency in an atmosphere of generosity and kindness.</p> <p>Impact: Build a community of trusted individuals.</p>
Sustainability (8)	<p>UHCL maintains stewardship over resources including but not limited to university finances and operations, the socio-physical environment.</p> <p>Impact: Make a difference in our world for generations to come.</p>

