Strategic Management & Metrics

Inaugural Leadership Forum – March 2013

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Purpose

- To appreciate how metrics can be used to make better management decisions and;
- To communicate achievements with external audiences

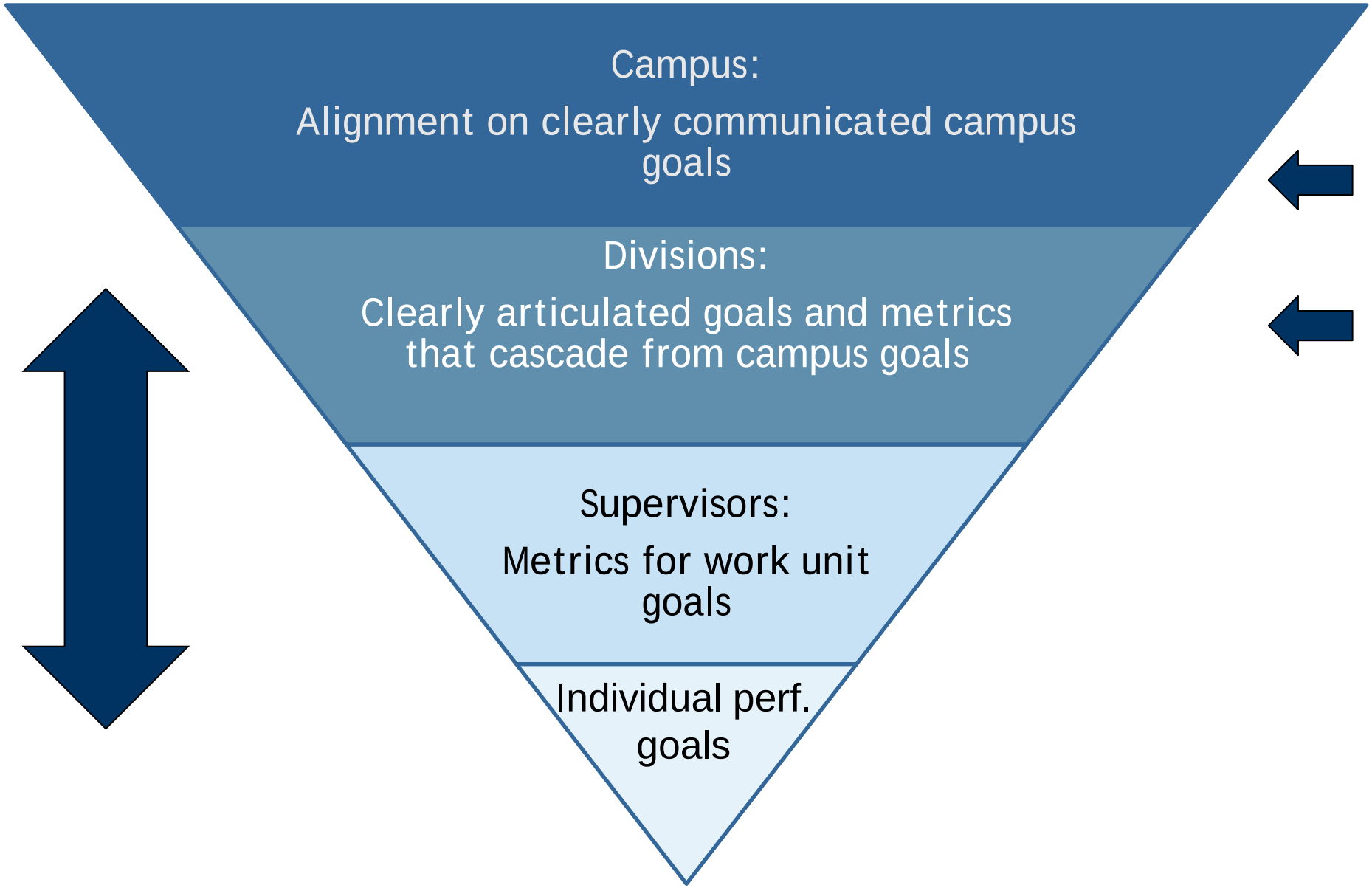
Introduction

- *How many of you have created metrics?*
- *How many of you find them useful ?*
- *How many of you "act" upon them?*

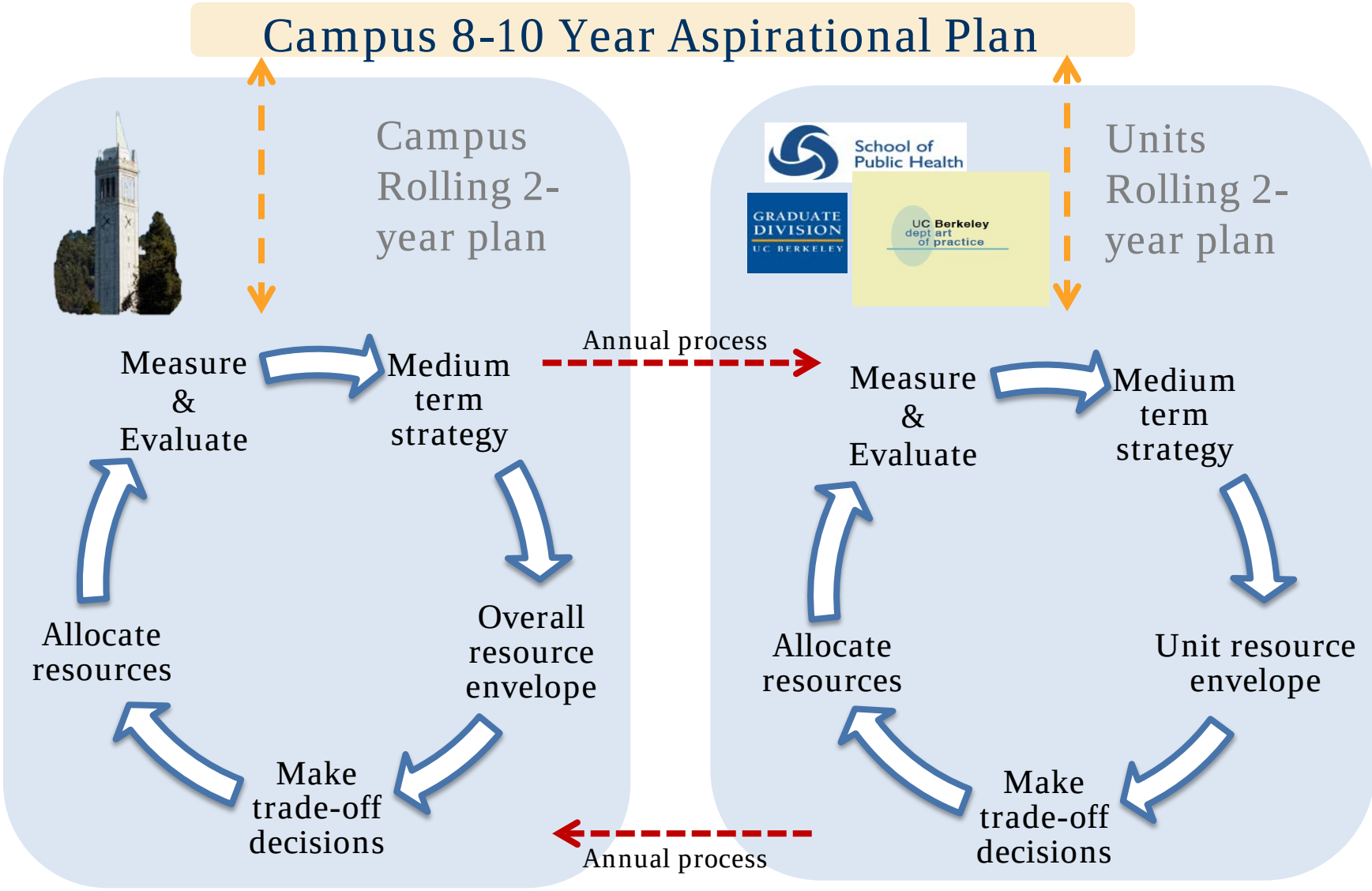
(A – Yes, B- No)

Where are we headed?

A clear “line of sight” towards our mission



How will we get there?



How will we get there?

Our goal is to support the development an **Integrated Framework for Strategic Planning, Resource Allocation and measuring performance**.

Core UCB Processes

Campus

Division

1. **2 Year** Rolling Planning
2. **Annual** Budgeting Process
3. **Quarterly** Business Review (QBR)

Strategic Management and Metrics Project

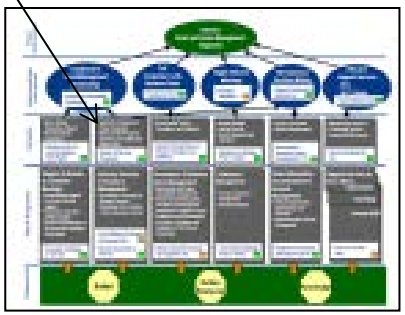
Phase I & II of the project is focused on "proving by doing"; working with pilots and enhancing existing tools

1

Campus Level Framework

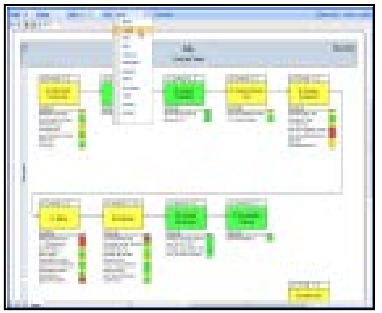
2

Division Level Pilots*



UCB Strategic Management and Metrics

Narrative/ Strategic Objectives	*Capital Plan*	*Issues*	*Financials*	*Metrics*



Division Goals & Metrics

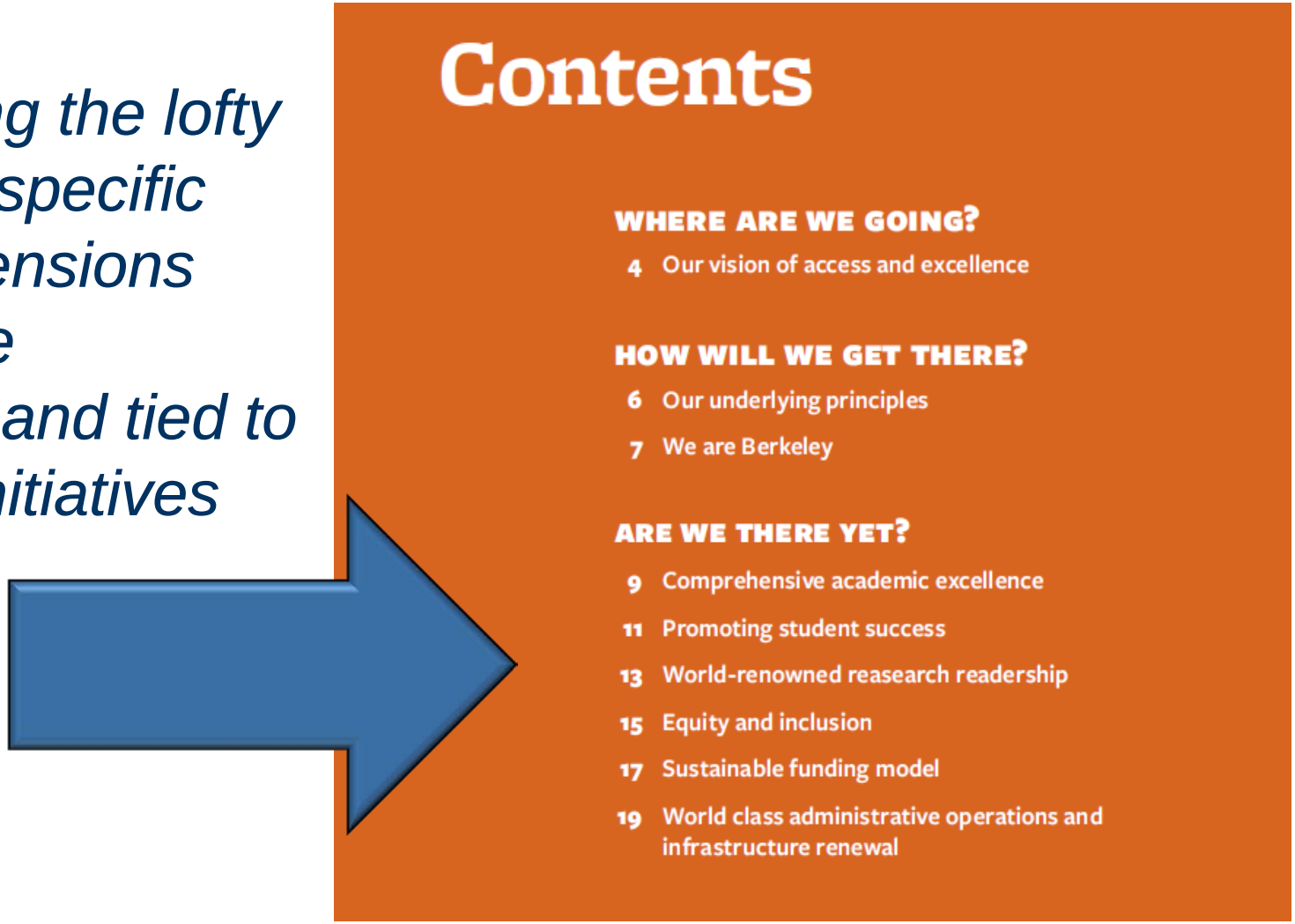
Strategy & link to Budget

Campus Common& Unit Metrics

Performance Monitoring

1. Operationalizing the campus goals (example)

Condensing the lofty goals to a specific set of dimensions that can be measured and tied to strategic initiatives



1. Campus Level Dashboard - example

A high level "common view" for performance monitoring and internal & external communications…

Key Objectives	Trend	Key Metric	Current Situation Narrative
1. ACADEMIC EXCELLENCE	On Target, ⇧	1.1 FACULTY AWARDS & RANKINGS	tbd
	On Target, ⇨	1.2 TIME TO DEGREE	tbd
	On Target, ⇧	1.3 TOP ECHELON OF GRADUATE STUDENTS	tbd
2. STUDENT SUCCESS	On Target, ⇨	2.1 MIDDLE CLASS ACTION PLAN	tbd.
	On Target, ⇨	2.2 ONE STOP SHOP	tbd.
	At Risk, ⇩	2.3 STUDENT SURVEY	tbd.
	On Target, ⇨	2.4 ….	tbd.
3. RESEARCH LEADERSHIP	On Target, ⇧	3.1 FEDERAL FUNDING TARGETS	tbd.
	On Target, ⇨	3.2 % R&D FUNDING	tbd.
	At Risk, ⇨	3.3 SOURCE OF FUNDS	tb
	On Target, ⇧	3.4 INNOVATION	
	On Target, ⇧	3.5 …	
4. EQUITY & INCLUSION	On Target, ⇨	4.1 INTERGROUP DISPARITIES	
	On Target, ⇨	4.2 NEW COURSE TARGET	bd.
	On Target, ⇨	4.3 FUNDRAISING	tbd.
5. SUSTAINABLE FUNDING	On Target, ⇧	5.1 OE COST EFFICIENCIES	tbd.
	At Risk, ⇨	5.2 REVENUE GROWTH	
6. ADMINISTRATIVE OPERATIONS	At Risk, ⇨	6.1 CAPITAL RESOURCES	tbd.
	On Target, ⇨	6.2 QUALITY OF SERVICE	tbd.
7. INITIATIVES	At Risk, ⇨	7.1 ON TIME	tbd.
	On Target, ⇨	7.2 ON BUDGET	tbd.

Illustrative Only

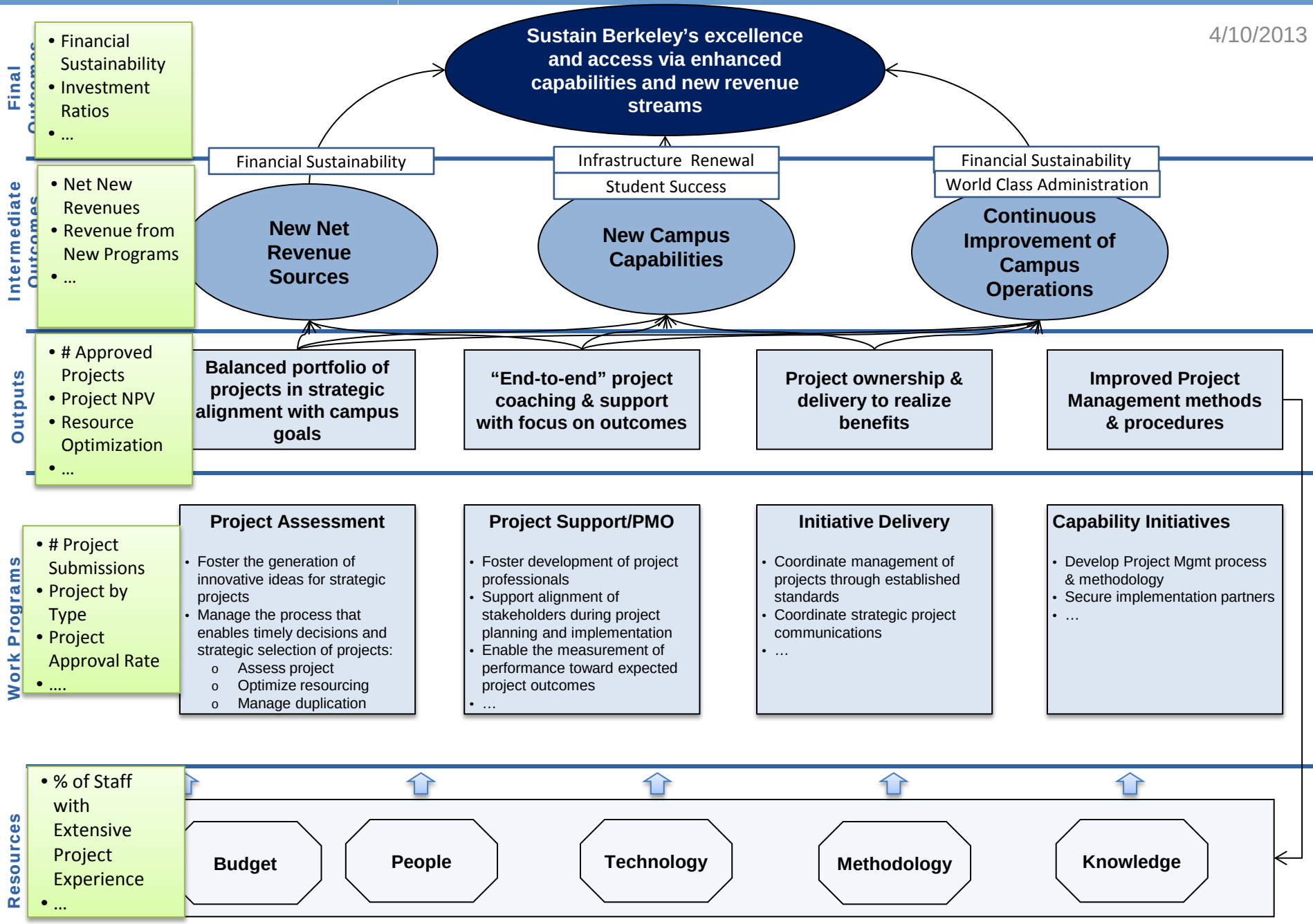
Legend: On Target = On Target; At Risk = At Risk; Issue = Issue

Trend Legend: ⇧ = Trending Favorably; ⇩ = Trending Unfavorably; ⇨ = Trend Unchanged

2. A “Results Chain”

Exercise

4/10/2013


Final Outcomes
• Financial Sustainability
• Investment Ratios
• …
Sustain Berkeley's excellence and access via enhanced capabilities and new revenue streams
Intermediate Outcomes
• Net New Revenues
• Revenue from New Programs
• …
Financial Sustainability
Infrastructure Renewal
Student Success
Financial Sustainability
World Class Administration
New Net Revenue Sources
New Campus Capabilities
Continuous Improvement of Campus Operations
Outputs
• # Approved Projects
• Project NPV
• Resource Optimization
• …
Balanced portfolio of projects in strategic alignment with campus goals
"End-to-end" project coaching & support with focus on outcomes
Project ownership & delivery to realize benefits
Improved Project Management methods & procedures
Work Programs
• # Project Submissions
• Project by Type
• Project Approval Rate
• ….
Project Assessment
• Foster the generation of innovative ideas for strategic projects
• Manage the process that enables timely decisions and strategic selection of projects:
o Assess project
o Optimize resourcing
o Manage duplication
Project Support/PMO
• Foster development of project professionals
• Support alignment of stakeholders during project planning and implementation
• Enable the measurement of performance toward expected project outcomes
• …
Initiative Delivery
• Coordinate management of projects through established standards
• Coordinate strategic project communications
• …
Capability Initiatives
• Develop Project Mgmt process & methodology
• Secure implementation partners
• …
Resources
• % of Staff with Extensive Project Experience
• …
Budget
People
Technology
Methodology
Knowledge

Metrics Worksheet

Level of Results Chain:
Table contact name & email:

Key Objectives	Key Metric	Source (If known)
1. OUTCOME (Final)		
2. OUTCOME (Intermediate)		
3. OUTPUTS		
4. WORK PROGRAM		
5 RESOURCES		

Guidance Sheet

Attributes of SMART metrics

- **S =Specific**
- **M =Measurable**
- **A =Actionable**
- **R =Relevant**
- **T =Timely**

- **Efficiency Metrics = Volume (#'s), Cost, Time (Responsiveness)**
- **Effectiveness Metrics= Quality, Satisfaction**
- **Also.. The " So what" Test?**