Strategic Management & Metrics

Inaugural Leadership Forum – March 2013

Louise Davidson – Project Lead
Metrics@berkeley.edu
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

Campus:
Alignment on clearly communicated campus goals

Divisions:
Clearly articulated goals and metrics that cascade from campus goals

Supervisors:
Metrics for work unit goals

Individual perf. goals
How will we get there?

Campus 8-10 Year Aspirational Plan

Campus Rolling 2-year plan
- Measure & Evaluate
- Make trade-off decisions
- Allocate resources
- Overall resource envelope
- Medium term strategy
- Annual process

Units Rolling 2-year plan
- Measure & Evaluate
- Make trade-off decisions
- Allocate resources
- Unit resource envelope
- Medium term strategy
- Annual process
How will we get there?

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

What actions are needed to stay on track?
Are we focusing on the right priorities?

What actions are needed to stay on track?
Are we focusing on the right priorities?

UCB Results

Template I

Strategic Context & Objectives
Resource Allocation
Performance Monitoring
Action Plan Management

Template II & III

Are we allocating resources and making trade-offs to meet our objectives?

Template V

Are we focusing on the right priorities?

Template IV

How well are we performing against agreed upon performance metrics?

Core UCB Processes

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*

- 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...

<table>
<thead>
<tr>
<th>Key Objectives</th>
<th>Trend</th>
<th>Key Metric</th>
<th>Current Situation Narrative</th>
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</thead>
<tbody>
<tr>
<td>1. ACADEMIC EXCELLENCE</td>
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<tr>
<td>1.1 FACULTY AWARDS &amp; RANKINGS</td>
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<tr>
<td>1.2 TIME TO DEGREE</td>
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<td>1.3 TOP ECHELON OF GRADUATE STUDENTS</td>
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<td>2. STUDENT SUCCESS</td>
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<td>2.1 MIDDLE CLASS ACTION PLAN</td>
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<td>2.2 ONE STOP SHOP</td>
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<td>2.3 STUDENT SURVEY</td>
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<td>2.4 ...</td>
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<td>3. RESEARCH LEADERSHIP</td>
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<td>3.1 FEDERAL FUNDING TARGETS</td>
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<td>3.2 % R&amp;D FUNDING</td>
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<td>3.3 SOURCE OF FUNDS</td>
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<td>3.4 INNOVATION</td>
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<td>3.5 ...</td>
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<td>4. EQUITY &amp; INCLUSION</td>
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<td>4.1 INTERGROUP DISPARITIES</td>
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<td>4.2 NEW COURSE TARGET</td>
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<td>4.3 FUNDRAISING</td>
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<td>5. SUSTAINABLE FUNDING</td>
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<td>5.1 OE COST EFFICIENCIES</td>
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<td>5.2 REVENUE GROWTH</td>
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<td>6. ADMINISTRATIVE OPERATIONS</td>
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<td>6.1 CAPITAL RESOURCES</td>
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<td>6.2 QUALITY OF SERVICE</td>
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<td>7. INITIATIVES</td>
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<td>7.1 ON TIME</td>
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<td>7.2 ON BUDGET</td>
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**Legend:**
- Green = On Target
- Yellow = At Risk
- Red = Issue

**Trend Legend:**
- ↑ = Trending Favorably
- ↓ = Trending Unfavorably
- = Trend Unchanged

February 2013
2. A “Results Chain”

Exercise
VCAF OEPO
You Can’t Measure What You Can’t Describe

Results Chain

Sustain Berkeley’s excellence and access via enhanced capabilities and new revenue streams

Financial Sustainability

New Net Revenue Sources

Infrastructure Renewal

Student Success

New Campus Capabilities

Continuous Improvement of Campus Operations

Continuous Improvement of Campus Operations

Intermediate Outcomes

Net New Revenues

Revenue from New Programs

Net New Revenues

Revenue from New Programs

# Approved Projects

Project NPV

Resource Optimization

# Approved Projects

Project NPV

Resource Optimization

Outputs

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

Final Outcomes

Final Outcomes

Work Programs

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

Budget

People

Technology

Methodology

Knowledge

4/10/2013
Metrics Worksheet

Level of Results Chain:
Table contact name & email:

<table>
<thead>
<tr>
<th>Key Objectives</th>
<th>Key Metric</th>
<th>Source (If known)</th>
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<tbody>
<tr>
<td>1. OUTCOME (Final)</td>
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<tr>
<td>2. OUTCOME (Intermediate)</td>
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<td>3. OUTPUTS</td>
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<tr>
<td>4. WORK PROGRAM</td>
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<tr>
<td>5 RESOURCES</td>
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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?