

The background of the slide features a large, light-colored watermark of the University of Edinburgh crest. The crest includes a shield with a book, a quill, and a scale, surrounded by the text 'EDINBURGH' and 'UNIVERSITY OF EDINBURGH'.

Edinburgh Balanced Scorecard
EUA Workshop on Institutional PIs
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Why?

- **Increased external emphasis on KPIs, SMART targets, etc**
- **Increasing external pressure on governance**
- **Recognition that management information was patchy and financially dominated**
- **Recognition that needed better to monitor strategic performance in increasingly competitive environment**

Summary of approach

- **2002 launched modified Balanced Scorecard... not THE BS as developed by Kaplan and Norton**
- **32 indicators under 4 perspectives... linked to Strategic Plan**
- **Presented annually to relevant committees with assessment of performance**
- **Suite of time series and comparative information/contextual information**
- **Publicly available... Freedom of Information**

Purposes?

- **Help senior managers monitor performance against Strategic Plan goals/highlight areas of concern**
- **Support governing body (Court) in monitoring University's overall performance**
- **Send messages on strategic priorities within University**
- **Provide the University with means of demonstrating accountability to stakeholders**

How?

- **Sold idea to Principal/Central Management Group/Court**
- **Interviews with senior managers**
- **Initial proposals discussed with Principal**
- **Modified proposals to CMG/Court**
- **Draft for approval**

Edinburgh Balanced Scorecard

- **32 indicators... four perspectives**
- **Looking at desired behaviour change**
- **More established indicators for comparative purposes**
- **Addressing Edinburgh-specific issues**

How we use the BS

- **Ongoing updates on Web**
- **Regular updates to Principal's Strategy Group**
- **Traffic light annual overview analysis to Court**
- **Performance improving, limited change/trend unclear, no progress/deteriorating, unable to assess**
- **(Selected) Russell Group comparative data**
- **Time series data... worked backwards/build up**

Acceptance

- **Light touch approach to management theory**
- **Adapting the methodology where appropriate**
- **Ensuring relevance to Edinburgh**
- **Avoiding limiting to pre-existing targets/data**
- **Contextual/more detailed material**

Ongoing developments

- Reviewed in light of Strategic Plan 2004-08
- Cascading the indicators
- Cascading the approach
- Benchmarking – within the UK/internationally

Issues/lessons

- **Initial support from the top**
- **Engaging the Principal's Strategy Group**
- **Flexibility on methodology**
- **Agreement on indicators... not methodology!**
- **Developing time series**
- **Comparative data availability... particularly international**
- **Developing targets**

Impact

- **Internal buy-in – management/governing body**
- **Impact on strategic planning**
- **Focussing the Court on strategic issues**
- **Behavioural impact**
- **Profile raising – impact on other universities**
- **Best Practice – CUC Good Practice Guide, CHEMS**

Issues for the future

- **Obtaining comparative information – particularly international**
- **Reviewing indicators – balance between old and new indicators/stability vs. refreshing**
- **How to cascade within institution and maintain relevance**

The background of the slide features a large, light grey watermark of the Edinburgh University crest. The crest is circular and contains a shield with various symbols, including a book and a cross. The word "EDINBURGH" is written in a semi-circle around the bottom of the crest.

Access to Edinburgh Balanced Scorecard

<http://www.planning.ed.ac.uk/BSC.htm>