# What Can the Business World Teach Us About Strategic Planning?

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**Abstract**

The need for a reliable strategic planning framework for distance educators and their institutions has never been greater than it is now. Increased government regulations, accreditation standards, and competition are converging with decreased funding from federal, state, and private sources, and administrators require better strategic planning. A strategic planning model known as the Balanced Scorecard has met with widespread adoption and sweeping success among the business community, but, surprisingly, has not been widely adopted among institutions of higher and distance education. In this article the authors share what they have learned about this strategic planning model through a review of the available literature and their own early efforts to introduce it to their institution, the Division of Continuing Education at Brigham Young University in Provo, Utah.

**Introduction**

Since its introduction in the late 1990s by Robert S. Kaplan and David P. Norton, The Balanced Scorecard (BSC) has gained rapid popularity as one of the best models for strategic planning and measurement within the business community. Despite its success in the corporate world, the BSC model has seen relatively little use within the higher and distance education communities. Yet, given the apparent strengths and merits of BSC in business and the success of some implementations by the international educational community, the time may be right for institutions of higher and distance education within the United States to consider anew this framework for planning strategy and measuring results.

**What is the Balanced Scorecard?**

Simply stated, the Balanced Scorecard (BSC) is a framework of strategic planning and measurement used to evaluate a business's desired performance of its objectives. Although certainly not the only framework of strategic planning, it succeeds in "address[ing] a serious deficiency in traditional management systems: their inability to link a company's long-term strategy with its short term actions" (Kaplan and Norton, 1996 p. 75). This deficiency, according to Kaplan and Norton (1996), stems from a company's overemphasis on short-term financial results as the primary determination of success. Financial gain may be the desired overall result,

but figuring out how a company arrives at this result holds greater value. For management to better pinpoint those actions that lead to success, the BSC model adds three perspectives to the prevailing financial perspective: customer, internal process, and organizational capacity. These four perspectives also balance short-term actions with long-term strategy as shown in Figure 1.



*Figure 1*. Summary of the balanced scorecard model.

BSC then aligns these four perspectives with the company's vision and objectives (Karathanos and Karathanos, 2005). Deborah Beard (2009) asserts that BSC is essentially a "component of a strategic management system that links the entity's mission, core values, and vision for the future with strategies, targets, and initiatives that are explicitly designed to inform and motivate continuous efforts toward improvement" (p. 275). Thus, BSC creates a system enabling all employees to regulate how their day-to-day tasks support the company's vision. This strategic planning framework follows four strategic processes (Kaplan and Norton, 1996). First is the process of translating the mission statement, or the vision, of a company into appropriate actions. Here the vision is broken down into a specific set of objectives and related measures that will provide evidence of both long-term success and achievement of the mission statement. Second, managers communicate and link strategy to all levels of organization, management, and employees. This allows everyone to understand the vision and unifies objectives throughout the company. Third, the business planning process identifies and allocates the appropriate funds, resources, initiatives, and coordination to meet stated objectives. Fourth, and perhaps most important, the feedback and learning process monitors results in the four areas and provides necessary feedback to realize continuous improvement of key measures. Because of the feedback from these related measures, leaders have the ability to pinpoint when a strategy is successful and when it needs revision (Kaplan and Norton, 1996).

**The Balanced Scorecard's Popularity in the For-Profit Business Sector**

Companies all over the world now use the BSC model despite its being nearly two decades old.

Karathanos and Karathanos (2005) reported that "by 2001 about 50% of the Fortune 1000 companies in North America and 40% to 45% of companies in Europe were using BSC" (p. 222). As recent as 2014, the United States Navy also reported implementing the BSC methodology (Albright, 2014).

Perhaps one reason this type of strategic planning remains popular is because of the Baldrige National Quality Program and other similar programs. In 1995, the Baldrige Program began requiring award recipients to present their best methods and practices relating to the following areas: "leadership; strategic planning; customer and market focus; measurement analysis, and knowledge management; human resource focus; process management; and business results" (Karathanos and Karathanos, 2005 p. 223). With the emergence of BSC, companies had an employable method that met the Baldrige Award's rigorous criteria. Thus, part of BSC's success is due to its ability to clearly display a company's competitiveness and success.

**How might BSC help the Education Sector?**

Could BSC provide the same successful framework to administrators of an educational institution? In 1995, the Baldrige program began adapting its criteria for use in education. This resulted in Congressional approval of the Malcolm Baldrige National Quality Award for Education in 1999. Like the business sector, the educational sector had begun to experience more competition and resource constraints. Furthermore, universities and colleges receive the bulk of their funding from government and other institutional sources. Thus, these sources and their perception of the educational institution's success dictate the flow of funds, grants, land, etc. This raises a question among educational administrators: How do these sources perceive performance success? The Baldrige award suggests the most successful indicators "lead to improved student, operational, and financial performance" (Karathanos and Karathanos, 2005, p. 224). With these indicators in mind, BSC appears to be a natural fit for planning and measurement within higher and distance education institutions. In fact, Ballentine and Eckles (2009), favorably suggest that "by focusing on internal processes, customers, and employee development, BSC can help a higher education institution continuously improve while achieving the goals that support its mission and vision for the future" (p. 34). But, despite the positive projections of BSC's successful application in education, comparatively little research exists to support these projections.

According to recent case studies, only seven college-level institutions in the United States report using BSC in their strategic planning (Ballentine and Eckles, 2009). Although the majority of these schools adhere to the original perspectives and planning framework laid out by Kaplan and Norton, the application and developed strategies vary greatly between institutions. A few institutions, like Ohio State and Rutgers University, entirely discard Kaplan and Norton's original four perspectives in exchange for their own education-focused perspectives (Ballentine and Eckles, 2009). Though these cases generally applaud BSC implementation, educational institutions have not embraced BSC as quickly as businesses did.

The slow start in the educational sector of the United States can be attributed to the structure of most large educational intuitions. A closer look at the institutions that implemented BSC reveals the majority to be small, private colleges with a specific disciplinary focus. For example, the University of Wisconsin-Stout and Kenneth W. Monfort College of Business both solely emphasize business and preparation for professional careers (Karathanos and Karathanos, 2005; Beard, 2009). The private, 1,000 student body, Jefferson College of Health Sciences specializes in health education and services, while the equally small Rhodes liberal arts college has no discipline-based accreditations and only one graduate program (Ballentine and Eckles, 2009). While these small discipline-focused institutions implemented BSC with success, the literature is generally void of examples of large, inter-disciplinary, accredited universities implementing

Kaplan and Norton's four-perspective framework.

Internationally, important policy changes regarding higher education encouraged universities in the United Kingdom to use BSC (Taylor & Baines, 2012). Taylor and Baines have analyzed the implementation of BSC at four distinct UK universities and drew clear and useful conclusions. While research including only seven American universities and four UK universities is limited, it is still useful in revealing the strengths and weaknesses of using BSC in an educational setting.

**What are the Strengths and Weaknesses of BSC related to the Education Sector?**

Analyzing the case studies for BSC implementation in the education sector has exposed weaknesses in utilization for higher and distance education. Two major hindrances for implementation of BSC are time and monetary resources. In his 2012 Executive Brief, Mihai Ionescu of BSC Romania noted that "statistics show that around 2/3 of BSC implementation projects fail to reach maturity within the first year and become a formal reporting system that is often abandoned soon after" (p. 4). He concludes that this is generally related to insufficient leadership commitment and incomplete understanding of BSC frameworks (Ionescu, 2012). In comparing BSC to other quality award models for strategic frameworks, Shuki Dror (2008) criticizes BSC for not considering the time it takes for strategies to produce results. Similarly, The Institute Way, a training company providing simplified strategic management skills with BSC, notes that "because achieving change is hard and maintaining momentum requires time to develop, it typically takes two to three years to get the scorecard system fully institutionalized into the organization's culture" (Rohm, Wilsey, Perry, & Montgomery, 2013, p. 49). Although Rohm et al. promise that the patience pays off, the time necessary to see significant change may hinder BSC's popularity. Taylor and Baines (2012) note that the UK universities saw not only a cost in time, but also a monetary cost because of both staff time and the expense of external consultants or knowledgeable experts. Strong consideration of available time and resources are necessary before an educational institution implements BSC.

Another limitation of BSC is its general complexity. Taylor and Baines (2012) casually report that BSC requires "significant work" at all levels of organization and often leads to a sense of "information overload" (p. 114, 116). Similarly, Monte Wynder, Wellner, and Reinhard recognize that although BSC attempts to simplify and provide clear performance measures, "if taken individually, the 20-25 measures, far exceed what individuals can effectively deal with in working memory" (Wynder et al., 2013, p. 370). Shuki Dror (2008) specifically critiques the "lack of basic guidelines for selecting performance measures" as well as the target setting methods (p. 592). Even the Institute Way, who avidly promote BSC measures, note the care that a company must take when applying the specific components of what they term "change management" (Rohm et al., 2013, p. 48). In their text, they graphically show that "one missing component, [or missing measure] can lead to confusion, false starts, anxiety, restraint and resistance, frustration or apathy" (p. 48). An institution must be able to follow BSC guidelines correctly, or the product will not be successful. In fact, the majority of research concludes there is a need for a "champion of BSC," or a group who clearly understands BSC methods and can instigate the process to eliminate deviation (Taylor & Baines, 2012, p. 122). However, May Leen Yu, Hamid, Ijab, and Soo (2009) claim that successful use of BSC in education can only come from adaptation. They promote what is known as an "e-BSC," a scorecard specifically adapted for education purposes. They believe that "since every institution of higher education would have different expectations from academic staff, the e-BSC has to be slightly modified accordingly for it to be suitable in the respective institution" (p. 826). Without these or similar modifications, BSC cannot guarantee success in the widely diversified education sector. And yet, BSC has still found favor with many researchers and the institutions that have already implemented it. Perhaps the strengths of the system outweigh the weaknesses.

Some researchers believe that the longevity of the program, including the time necessary to implement it, aids its success. The BSC framework focuses on long-term goals instead of short-term results. Because of this, its framework requires time to track and measure how well the short-term results are progressing towards long-term goals, and it can be more thorough. When focusing on quick results, an educational institution can fall into what John Taylor (2012) calls "a 'measurement industry' in which data collection and presentation work become disproportionate to the task of assessing whether a strategy is being achieved or otherwise" (Taylor & Baines, 2012, p. 121). One of BSC's dominant strengths is a thorough assessment of a strategy's success.

Time is not wasted waiting for results, because the process itself is providing them. Beard (2009) notes that "learning can be tracked while monitoring progress in building the capabilities and acquiring the resources that enhance the capacity to improve student performance" (p 277). This process provides two levels of feedback year after year. In their study of the e-BSC adaptation, Yu et al. (2009) plot the evaluation process by assigning target settings at the beginning of each year, monitoring and tracking performance throughout the year, and then evaluating individual performance achievements at the end of the year. This process repeats annually with the intention the results will aid the next year's target decisions. While this process takes time, the results promise a thorough understanding of what areas need growth and improvement, which leads to continuous progress. To prevent loss of time on mistakes or failed strategies, Ballentine and Eckles (2009) suggest prototyping the scorecard. Specifically, they suggest creating a prototype based on the most easily accessible data even if it is imperfect. They believe that presenting this prototype to decision makers will allow for the detailed feedback and revision necessary for a successful beginning (Ballentine and Eckles, 2009). Thus, while feedback and evaluation cost time, the surplus of useful information and progression produces long-term improvement.

Another strength of BSC that is specifically attractive for institutions of higher and distance education is its ability to focus on external results such as student performance, as well as on internal workings such as staff performance. Many organizations focus too heavily on product, which for education may be student enrollment, graduation rates, or test results, but an organization's success is also dependent on employees (Yu et al., 2009). In their case study, Yu et al. suggest "great emphasis has to be placed on measuring the competency and accomplishments of the staff to carry out short term strategies that are in line with long term goals" (p 814). If the goals and actions of staff, faculty, and management within a university are not aligned with its mission and vision, the university will never be able to achieve its long-term goals. However, when staff development and performance management are united in support of the university's vision for achievement, staff and faculty can observe how their individual merits tie directly to the success of the university. This provides a template that Taylor and Baines (2012) lauds as a "cascade to link all levels of an organization to the corporate strategy" (p. 114).

Not all researchers feel BSC is complex and overwhelming. Taylor and Baines (2012) herald BSC as "clear and simple" (p. 114). Specifically, they report that "the Scorecard offers a straightforward and holistic approach that is widely appreciated and the case studies show this tool can assist in the alignment of communication and strategy in universities" (Taylor & Baines, 2012, p. 122).

If BSC is perceived as complex, it must be broken down through the commitment of leadership and by clearly mapping and visually presenting data. The work-flow system of understanding BSC and delegating responsibilities is imperative to the success of the scorecard in an education institution. Some researchers, such as Yu et al., break down the process into step-by-step directions with supplemental web-charts (Yu et al., 2009, p. 820-21). Others, like Taylor and Baines (2012), point out that not only are consultants useful to initially motivate and direct the

organization's implementation of BSC, but "leadership and interest at the highest level in the measurement of the achievement strategy was fundamental to adoption and development of a formal measurement approach" (p. 118). Without a strong commitment from leadership, there cannot be unity and alignment. These are key to the success of BSC.

In order to simplify BSC, the data should be presented in the most accessible way possible. Ballentine and Eckles (2009) highlight the strategies of both Jefferson and Rhodes colleges for data presentation and preservation. Both colleges used technology to visually present data to employees and partners. Jefferson employed a database that enabled departmental access in order to connect each department's strategic objectives with the college's strategic objectives through the scorecard. While Rhodes College simply used an Excel workbook, their column breakdown allowed detailed presentation of progress. Specifically, they use a "sparkline" to show each measurement's values over the years. This is useful because the trends of these measurements can be easily presented in a very small space. Taylor and Baines (2012) explain similar success with UK universities, and suggest institutions carefully consider their visual presentation and Scorecard format, and the use of "benchmarking" and "establishing appropriate labels" for goal indicators (p. 123). Whatever the method, the goal is to allow an easily accessible and understandable presentation of the Scorecard and its measurements. If employees don't have a clear understanding of BSC, the strategic objectives will not be met and staff will feel dissatisfied and overwhelmed. A strong leadership commitment, along with clear visual presentation and understanding of the scorecard, makes BSC more relevant and useful.

One reason BSC was originally considered for use in education institutions was its adaptability for multiple institutions' needs and missions. However, how much deviation is necessary from Kaplan and Norton's original four perspectives is debated. Yu et al. (2009) specifically promoted an education-focused adaptation of BSC (e-BSC) and then surveyed the quality and effectiveness of their adapted model. The results show that, while none felt the e-BSC was unsuitable, 64% considered it suitable but still needing modifications (p. 825). Every institution of higher education will have differing mission statements, staff expectations, goals, etc. and thus will need to adapt BSC to fit their specifications. As seen from Ballentine and Eckles's (2009) research, Rutgers and Ohio State also felt the need to deviate from the original BSC framework. However, not all businesses have the same mission statements, size, vision, and long-term goals, and yet BSC has succeeded in half of the fortune 1000 companies without major modification. After discussing Rutgers and Ohio State's BSC modifications, Ballentine and Eckles conclude their research with the following advice: "it is unnecessary to recreate the BSC model; the four perspectives proposed by Kaplan and Norton are appropriate to the management of a nonprofit higher education institution" (p. 34).

**From Theory to Practice: Deciphering the Disconnect**

Considering the strengths and weaknesses of BSC, its undisputable success in the corporate world, and the positive projections for its implementation in the field of higher education, why do more educational facilities not apply BSC in their strategic planning? Taylor and Baines (2012) recognize that "for some staff in universities, there is a resistance to the techniques from the business world" (p. 116). Specifically, those in education may feel that a model suited for business does not belong in education.

Furthermore, education and business tend to use different terminology, and resistance may come simply because the business model sounds foreign. In the study of the four UK universities, Taylor and Baines (2009) specifically recommend modifying vocabulary whenever implementing BSC. For example, one UK University chose to reference students as "partners" instead of "stakeholders" (Taylor & Baines, 2012). At another UK university, the use of educational language equivalent to the corporate jargon played a key role in understanding and

implementing BSC (p. 120). There must be a specific audience in mind when writing and implementing BSC, and the language chosen to label the processes must match that audience.

Another possible roadblock to the success of BSC in higher education is the difficulty of bringing decision makers across a university to consensus about the institution's intended results and how they should be measured. The number of disciplines, deans, faculty, and staff provide a daunting web of perspectives and objectives which creates a nesting effect of multiple Scorecards. As Ballentine and Eckles (2009) point out, the implementation of BSC in higher education is "not an easy task" (p. 34). Furthermore, higher education is steeped in tradition and resists change. Ballentine and Eckles (2009) note, "to some people BSC may represent just another long line of models, plans, or processes that do nothing more than waste time and resources" (p. 34).

As daunting and difficult as the BSC model is to implement, the case studies report success from the institutions that clearly followed the methods set out by BSC. Other institutions may more readily apply BSC if they could see and observe firsthand the positive experiences of universities that use BSC in their strategic planning. Because of this, the authors here endeavor to report their own experience implementing BSC among one of the departments within the Division of Continuing Education for the privately-owned and faith-based Brigham Young University located in Provo, Utah.

**A firsthand look at BYU Continuing Education's initial exploration of BSC**

A qualitative study follows of the on-going efforts to explore and implement the BSC strategic planning model by administrators within the Division of Continuing Education at Brigham Young University. The narrative contains personal thoughts, feelings, observations, successes, struggles, and plans springing from lived experience, which reflect the strengths and weaknesses of BSC found in the current literature. This autoethnography is an attempt to provide useful and practical perspectives from administrators who are trying to make sense of BSC within their organization.

The division's principal researcher gathered data over a 22-month period by way of journaling, whiteboard pictures, and meeting notes. He tested data credibility with others in the division who also participated in the implementation efforts. His journal also made researcher reflexivity possible. He then tested data dependability by keeping an audit trail binder containing the various artifacts, which were then independently compared to this article's text for consistency.

The first day of exploration involved the dean of the Division of Continuing Education to ensure the necessary commitment and support from top leadership—always required for successful BSC implementation. Month's earlier, the vice president of the university who oversees the Division authorized the dean to replace the traditional college-style planning process with one of his own design in order to better meet the needs of this uniquely financially-self-sustaining operation. The dean, concerned about the rapidly changing environment for continuing education offerings, asked his assistant, the principal researcher, to revise the current strategic planning process which had mirrored the university's resource planning processes for years.

The assistant struggled with this task until a fellow employee introduced him to BSC, the topic of a recently attended professional development seminar that primarily targeted businesses. This employee's enthusiasm and convincing rhetoric on how BSC might help the Division encouraged the assistant to explore the BSC model and propose further consideration by the dean's office and department directors.

The proposal, he later realized, failed to appropriately represent BSC, but succeeded in initiating a conversation about the need for changing and improving the strategic planning and measurement efforts with the Division. Eight months later, the dean approved funding for the principal researcher and five directors to attend a multi-day training on the BSC methodology sponsored by a professional institute. The directors selected comprised a cross-section of interests from across the Division, including credit and non-credit programs, marketing, computer operations, and human resources.

**Training**

The training sessions sparked their interest, and the dinner conversations each evening were filled with questions about how to apply what they were learning. The experience convinced them that BSC had merit as a planning framework for their continuing education activities.

Because none had an adequate understanding of the framework to fully explain it to the dean upon returning, they proposed a loosely organized brainstorming group with one additional member: the director of online educational offerings. This Strategic Framework Evaluation Committee began a four-month long project of reading and discussing a recent book: The Institute Way: Simplify Strategic Planning and Management with the Balanced Scorecard by Rohm, Wilsey, Perry, and Montgomery (2013). Amidst discussions, the committee began creating mock strategy maps to solidify understanding of the strategy development process.

Upon completion of the book review, the committee heartily presented a jointly authored document to the dean and associate deans containing the committee's shared understanding of BSC. The dean's office identified two of the weaknesses of BSC found in the literature review. First, the dean's office was skeptical of an all-or-nothing approach to implementing BSC given its perceived overwhelming complexity and jargon. Second, they were cautious about the perceived resources necessary for a multi-year implementation. The committee was authorized, despite the noted weaknesses, to decide what adjustments were required to the division's current planning activities in order to adapt BSC without causing confusion and draining resources.

**An Adjusted BSC**

No one from the committee knew what an adapted BSC looked like, nor did they find literature regarding other distance and continuing education entities employing BSC frameworks. The principal researcher felt they were taking a step into the dark. Adapting the framework also seemed contrary to the nine-step process they had learned at the previous training and in the book they reviewed. During the next few meetings, the committee sought to balance the expectations of the more formal BSC methodology with the dean's request for adaptations. The discussions ranged from a complete implementation of BSC to replace the division's current planning activities, to simply adding BSC-style objectives to existing planning documents.

The discord amongst committee members regarding an adapted BSC placed the project in jeopardy. However, they ultimately agreed on three adjustments: (1) starting a project to interpret the division's mission and dean's vision documents through a BSC lens, (2) starting regular, monthly, cross-departmental discussion groups, and (3) developing departmental strategic objectives. Despite differing opinions, they agreed to present these proposed adjustments to advance the project forward. After some discussion with the Dean's office, permission was given to take one step at a time and, upon reporting findings from each adjustment, to then await authorization to proceed.

**Adjustment #1.** The committee planned an exercise at the annual, all-day management meeting with all department directors and the dean's office to begin the project. The exercise included

asking each attendee to define success in terms of a two axis grid (see Figure 2). One axis listed the prominent themes of the dean's vision document: (1) being true, (2) being trusted, and (3) being relevant. The other axis included BSC perspectives: (1) organizational capacity, (2) internal process, (3) financial stewardship, and (4) customer & stakeholder (later changed to student, teacher, & partner). Each attendee was invited to describe what success looked like for each intersection on the grid using a sticky note.
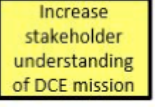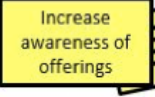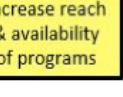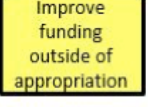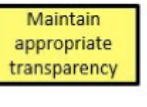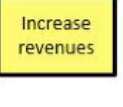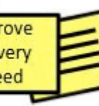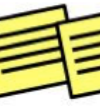
| | True | Trusted | Relevant |
|---|---|---|---|
| Student / Customer | Enhance University relationships | Increase stakeholder understanding of DCE mission | Increase awareness of offerings / Increase reach & availability of programs |
| Financial stewardship | Improve funding outside of appropriation | Maintain appropriate transparency | Reduce costs / Increase revenues |
| Internal process | | Improve reliability of services | Improve delivery speed |
| Organizational capacity | Improve professional development | | Enhance technology |

*Figure 2*. Grid for defining success at the intersections of BSC perspectives and the Dean's objectives.

Following this exercise, the committee met weekly and painstakingly categorized each of the 124 sticky notes into BSC-style objectives. Keeping the dean's vision in mind, the committee interpreted the project through the BSC lens and produced the following 12 BSC-style objectives:

To be true, trusted, and relevant, we must:
1. Refresh tools and technology
2. Improve assessment of offerings and programs
3. Better share resources and functions within our division
4. Refresh our offerings and programs
5. Improve the alignment of offerings and programs with the university mission
6. Simplify internal processes
7. Refresh the knowledge, skills, and abilities of our employees
8. Better relate to our partners
9. Optimize our scarce resources
10. Deepen the impact of our offerings and programs
11. Improve management of our organizational capacity and usage
12. Grow awareness of our mission with stakeholders and students/participants

A presentation of these BSC-style objectives to the dean's office resulted in an invitation to take an hour at the upcoming annual workshop for all full-time administrators (approximately 100 employees) with 12 breakout groups, each group focusing on one of the 12 objectives. The committee decided the chair should facilitate the exercise as a whole, while each member of the committee would lead one of the breakout groups. Because there were more topics than members, several others were recruited. Each was then trained on the Strengths, Weaknesses, Opportunities, and Threats (SWOT) discussion format.

As a standard practice, a survey is conducted after every annual workshop to measure the helpfulness of each presentation. The survey response for this session indicated 81 percent of respondents thought it was helpful or very helpful. The open-ended comments about the breakout session were also generally positive. The discussion group leaders felt there wasn't enough time to cover all of the SWOT analysis, and found it difficult to keep attendees on topic.

**Adjustment #2.** The committee spent the next few weekly committee meetings analyzing the group discussion activity, which resulted in a determination to take another step into the dark by moving on to another of the three adjustments to BSC originally noted. They developed a document entitled, "A Culture of Strategic Action Groups." It detailed proposed steps to nurture a culture of voluntary monthly discussion groups focusing on the 12 objectives. Registration for a topic group would be processed by the division's registration system. The same discussion leaders from the annual workshop led the discussions and took notes, which were published to the division's internal shared drives.

Six months later, the discussion leaders were asked to comment on their experience thus far. Several positive comments are summarized below:

- The staff feel they are more involved and have a voice
- The discussions seem to dissolve geographical distances (organization is currently in four buildings)
- Generating good and positive ideas
- Employees are getting to know one another better
- Good questions about purpose are being answered
- They facilitate the "water cooler" discussions
- Projects are emerging

Negative comments centered on attendance issues and problems with topics not lending themselves to innovative projects. In a survey of discussion group attendees, comments were similar.

**Adjustment #3.** Given this generally positive and successful introduction of monthly discussions, the committee continued promoting and arranging discussion groups with plans to refresh topics and facilitators. Riding the success of the discussion groups, the committee decided to tackle the last of the three original adjustments. The final adjustment introduced a prototype scorecard intended to be modified and used by all departments within Continuing Education as a way of assessing progress towards specific department objectives related to the 12 division objectives (see Figure 3 for the principal researcher's own department scorecard). Leadership in each department would then define objectives related to their daily activities that link to the division-wide 12 objectives.

| Strategic objective | Intended results | Index |
|---|---|---|
| Students, teachers, and partners | | |
| Improve client | All department clients are satisfied with the | |

| | | |
|---|---|---|
| satisfaction | services they received. | Yellow |
| Satisfy accreditation | All accreditation requirements are met. | Green |
| Improve DCE planning | All planning is connected and aligned with the BYU mission and DCE strategies and is backed by appropriate research. | Yellow |
| Improve communication of results and consulting | All communication of assessment results and research follow the department's standards of communication excellence. | Yellow |
| Financial stewardship | | |
| Optimize department funds | All expenditures are within budgeted amounts. | Green |
| Internal process | | |
| Improve objective defining | All planned objectives across the division are SMART. Specific, Measurable, Attainable, Relevant, and Time-bound. | Red |
| Improve research | All research is accurate, timely, and relevant. | Yellow |
| Improve assessment | All assessment is connected and aligned with planned objectives and meets standards of assessment excellence. | Yellow |
| Organizational capacity | | |
| Refresh employee knowledge, skills, and abilities | Our department employees are knowledgeable, skilled, and able. | Green |
| Refresh department tools and technology | Our department tools and technology are excellent. | Green |

*Figure 3*. Prototype scorecard for the principal researcher's department: Assessment, Accreditation, and Research.

The scorecard for each department communicates a link between daily activities and the division-wide objectives. Since each department's daily activities differ (e.g., online program vs. live conferences vs. week-long camp), the objectives on the scorecards are unique for each department, but each objective will connect with one of the 12 division-wide objectives. Once in place, the scorecard is then used during resource planning to determine priorities and projects.

**Conclusion**

While BSC has already achieved undisputable success in the business world, this strategic planning method is still largely unknown to the distance and continuing education community. However, the time for considering its usefulness is now as these entities face mounting pressure to succeed despite mounting government regulation and accreditation oversight, decreasing funding sources, stiffening competition, and increasing calls for accountability from stakeholders. It is evident that any use of BSC will require senior administrators to understand and fully support its methodology. By sharing what some administrators of Division of Continuing Education learned from a literature review on the BSC methodology and the early stages of their implementation at Brigham Young University, it is hoped that more distance and continuing education institutions will consider this strategic planning model and share their findings with others in the community.

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