

A Business Unit Balanced Scorecard for the Information Access Operations Branch of Shared Services BC, Ministry of Citizens' Services

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July 4, 2010

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EXECUTIVE SUMMARY

The Information Access Operations (IAO) Branch (the Branch) was recently created within Shared Services BC in the BC Ministry of Citizens' Services. This organizational restructuring has meant a new approach to how access to information and records management services are delivered within the BC public sector. The shared services approach to service delivery focuses on: reducing internal costs, standardizing processes, improving systems, quality and speed, and creating a more client-centred and outcome-oriented approach that is more accountable (Accenture, 2005). There is a need to align the Information Access Operations Branch's activities and approach to service delivery to that of Shared Services BC, to help the new Branch become a high performing shared services organization.

The purpose of this report is to create a business unit balanced scorecard for the Information Access Operations Branch that will strategically align it to Shared Services BC. This was done by developing performance objectives for the Information Access Operations Branch in alignment with the following three goals of Shared Services BC:

1. Reduce unit and overall shared services costs
2. Be accountable to our clients
3. Maintain a high level of client satisfaction

The three goals of Shared Services BC represent a set of principles to guide the design and operation of the organization. In addition to creating alignment, the purpose of the business unit balanced scorecard is to help communicate the strategy of the branch to its employees, assist in developing and implementing long-term strategies for growth, and to ensure that performance is reviewed and improved on an ongoing basis.

The process of creating a business unit balanced scorecard for the Information Access Operations Branch involved two focus groups; one with senior staff members who provide access to information services, and the other with senior staff members who provide records management services. Participants in each focus group were asked to identify performance objectives for the Branch that were aligned with the three goals of Shared Services BC. Performance objectives were identified in the following four balanced scorecard perspectives: customer perspective, internal processes perspective, financial perspective, and employee learning and growth perspective. Each focus group went through a process of narrowing the performance objectives that were identified into 5-6 key performance objectives. To assist in implementing the business unit balanced scorecard, performance measures, targets, timelines and initiatives were identified for each of the key objectives.

The following nine performance objectives were identified by both focus groups in the four balanced scorecard perspectives:

Objectives from the Customer Perspective

1. Create & maintain positive partnerships & relationships with our clients
2. Meet statutory obligations

*Objectives from the **Internal Processes Perspective***

3. Develop a communication plan
4. Rationalize & simplify processes to meet client needs and create efficiencies
5. Ensure quality assurance & regularly report our results

*Objectives from the **Financial Perspective***

6. Reduce costs by being efficient and creating value
7. Define core services & create service agreements

*Objectives from the **Employee Learning & Growth Perspective***

8. Create a learning organization to improve staff competencies & develop needed workforce skills
9. Rationalize job descriptions & classifications & determine what skills are needed for each position

The types of performance objectives identified in the focus group sessions reflect the fact that the Branch is still in the early stages of forming and implementation. Once the Branch has created service agreements with its clients, with defined performance metrics, additional time should be spent mapping out more detailed performance measures and targets for the Branch.

A strategy map and a business unit scorecard were created using these nine performance objectives. The strategy map shows the step-by-step connection between the strategic objectives in the form of a cause-and-effect chain. A plan for implementing the balanced scorecard was created, and outlines the performance measures, targets, timelines and initiatives associated with each of the above performance objectives. The final business unit balanced scorecard incorporates the above performance objectives for the Information Access Operations Branch, along with the vision, mission and goals of Shared Services BC.

The following three recommendations are made to the Information Access Operations Branch, to encourage successful implementation of the balanced scorecard, and future success using the balanced scorecard framework:

1. Communicate the Branch balanced scorecard, strategy map and implementation plan to staff.

Communicating the balanced scorecard to staff is a key step in implementation, particularly for those staff members who did not participate in the focus group session. To date, a number of steps have already taken place to communicate IAO's balanced scorecard to staff. In June 2010, the researcher provided an overview of IAO's balanced scorecard to all staff in the Branch meeting. Following this staff meeting, the balanced scorecard and strategy map were posted on the Branch SharePoint site for staff to access and reference when they prepare their annual EPDPs. In addition, during the Branch staff meeting, all staff participated in a flip chart exercise in small groups. The groups identified their top three suggestions for accomplishing four (of the nine) performance objectives on

IAO's balanced scorecard. This brainstorming exercise engaged the entire Branch in developing strategies for achieving a number of the objectives set out on the balanced scorecard. It is recommended that the Branch balanced scorecard plan (found in Appendix A) be communicated to all staff within the Branch. It is also recommended that the Branch continue to communicate progress made on IAO's balanced scorecard plan.

2. Spend additional time mapping out more detailed performance measures and targets on the implementation plan.

The Branch may wish to engage in additional discussions to further identify performance measures and targets that will help the Branch measure and report on its results. In the implementation and measurement plan, these areas are marked as 'to be identified'. To assist in implementation, additional time should also be spent assigning responsibility to each of the initiatives. The Branch may wish to wait until service agreements, or service deliverables, have been outlined, as this would assist with identifying appropriate performance metrics that should be measured and reported. The Branch is currently scheduled to hold another workshop in August 2010 to complete the implementation and measurement plan. Once the implementation plan is completed, it is recommended that the results be available for staff viewing on the Branch SharePoint site. Staff could be encouraged to reference these documents as they prepare their annual EPDP and set out their key work goals and targets for the year. This will be an opportunity for staff to align their activities to the priorities of the Branch.

3. Develop a plan for revisiting the scorecard on an annual basis, at minimum.

To ensure that the balanced scorecard remains current, the Branch should consider developing a plan for revisiting the scorecard on an annual basis, at minimum. Objective setting focus groups should be held on an annual basis so that participants can review and modify the Branch's performance objectives as priorities shift. The months of April and May would be a good time to conduct an annual review as government annual service plans are published in the month March. Any changes reflected in the Ministry service plan could be considered when reviewing the business unit scorecard. The employee performance and development plan cycle runs from June 1st to May 31st. Completing the annual review during April and May would also mean that the updated scorecard would be available to staff to refer to (and align to) when they start the planning phase of their performance and development plans. Future workshops may wish to consider beginning with an assessment of the Branch's current environment, using the Strengths, Weakness, Opportunities and Threat analysis. This may help capture the key changes that have occurred for the Branch since the previous year.

INTRODUCTION

The Information Access Operations Branch was created in early 2009 within Shared Services BC, a division of the Ministry of Citizens' Services. The Branch was formed following the decision to consolidate government's access to information and records management services. The drive behind centralizing these services was to facilitate more efficient processes by standardizing government-wide practices and streamlining business processes. In particular was the motivation to improve government's response time for processing FOI requests. This was in response to a report from the Office of the Information and Privacy Commissioner for BC which criticized government's response time for processing FOI requests. Prior to centralization, FOI and records management services were, for the most part, handled within teams in individual ministries. The process of creating the Information Access Operations Branch has involved bringing together employees who previously operated independently in small teams throughout different ministries.

Shared Services BC uses a shared services approach for delivering internal services to the provincial government. The shared services approach to service delivery is typically used by organizations to: consolidate functions to create efficiencies and economies of scale, improve service delivery, improve reporting and tracking, develop consistent and high quality service standards, and create cost savings. The process of creating and implementing a new shared services program has involved more than simply bringing employees together and giving them common processes and systems to create efficiencies. Successful shared services organization must embrace a shared services framework that is client-centred, outcome-oriented, and accountable.

Now that the IAO Branch has been created, there is a need to align the activities of the Branch with the goals and operating principles of Shared Services BC. Shared Services BC has a distinct vision, mission, and set of goals (or operating principles) that focus on providing high quality services to public sector organizations. The three goals are: 1) reduce unit and overall shared services costs, 2) be accountable to our clients, and 3) maintain a high level of client satisfaction. To fully achieve a shared services approach to service delivery, the Information Access Operations Branch should have clearly defined performance objectives that are linked to the three goals (operating principles) of Shared Services BC. Creating alignment will involve IAO determining what it must excel at to support the achievement of these goals. Employees within IAO will also need to have an understanding of how the vision, mission and goals of Shared Services BC translate down to the work of the Branch, and how the work they do contributes to these organization's broader goals and objectives.

The purpose of this project is to create a business unit balanced scorecard for the Information Access Operations Branch, to strategically align it to the three goals of Shared Services BC. A strategy map was also developed to show the step-by-step between strategic objectives in a cause-and-effect chain. To assist with the implementation and measurement of the business unit balanced scorecard, performance measure, targets, timelines and initiatives were developed for each of the objectives on the balanced scorecard. This project is important because it will help to: strategically align the Branch service delivery approach to that of Shared Services BC, communicate the objectives of the

Branch to its employees, assist in developing and implementing long-term strategies for growth, and ensure that Branch performance is reviewed and improved on an ongoing basis. The balanced scorecard will also help employees and teams develop a clear line of sight between their work and the broader objectives of the Branch and goals of Shared Services BC.

ORGANIZATIONAL BACKGROUND

Creation of the Information Access Operations Branch

IAO was created in January 2009 when the BC Government centralized its delivery of access to information and records management services. Prior to centralization, access to information and records management services were, for the most part, handled within individual ministries. The purpose of centralizing these services was to facilitate more efficient processes by standardizing government-wide practices and streamlining business processes. In particular, was the drive to improve the response times for access to information requests (a.k.a. Freedom of Information (FOI) requests).

The drive to improve response times on FOI requests was initiated by the Office of the Information and Privacy Commissioner for BC in February 2009 when they published their first compliance report card for the 2008 calendar year. This report criticized the BC government's response time for processing FOI requests, pointing out that 29% of government's responses to FOI requests were overdue (Office of the Information and Privacy Commissioner for BC, 2009). The BC Government's announcement to centralize access to information services occurred one month prior to the release of the Information and Privacy Commissioner's report card on the timeliness of government's access to information responses.

The process of centralizing these services has occurred incrementally since January 2009. The creation of the Information Access Operations Branch has involved bringing together employees from different teams in different ministries across the BC Government. These teams originally operated independently from one another. The creation of the Branch has involved significant organizational restructuring; teams have been separated and re-designed in an effort to streamline service delivery. For staff within the Branch, this has meant a significant shift in focus, from providing a service within a ministry, where the general public was the client, to becoming part of a more service-oriented organization where the ministry is the client and the general public is the end user.

The Work of the Branch

The role of IAO is to assist ministries and other public bodies to meet their obligations under the *Freedom of Information and Protection of Privacy Act* (FOIPPA) and *Document Disposal Act* (DDA), by providing FOI request processing, FOIPPA advisory and training services, records management training, tools and services, including contracted records storage for all of government (Ministry of Citizens' Services, Shared Services BC, 2010). IAO also provides input and support for government's management of records within the provincial government's control and/or custody (Ministry of Citizens' Services, Shared Services BC, 2010). Access to information services, and service standards, are legislated under the BC *Freedom of Information and Protection of Privacy Act* (FOIPPA). Service delivery standards for FOI requests are outlined under the *Freedom of Information and Protection of Privacy Act* and monitored for compliance by the Office of the Information and Privacy Commissioner for BC.

Strategic Planning to Date

A review of existing strategic planning information is helpful for understanding the priorities that have been identified for the Information Access Operations Branch. The Ministry of Citizens' Services latest Service Plan was examined, paying close attention to the objectives that impact the Information Access Operations Branch. Strategic planning information for Shared Services BC was also reviewed, as the development of IAO's business unit balanced scorecard involves establishing linkages to the priorities of Shared Services BC.

Ministry of Citizens' Services

The Ministry of Citizens' Services 2010/11-2012/13 Service Plan outlines the Ministry's strategic priorities for the next two fiscal years. The mandate of the Ministry is to, "...transform, deliver and promote services which are cost-effective, accessible and responsive to the needs of citizens, businesses and the public sector" (Ministry of Citizens' Services, 2010). The Service Plan further outlines the purpose of Shared Services BC as: "Shared Services BC integrates the delivery of goods and services to provide innovative, responsive and cost-effective services to the public sector" (Ministry of Citizens' Services, 2010). The Service Plan outlines six goals for the Ministry for the next two fiscal years. Goal number three (shown in Table 1) is directly linked to the activities of the Information Access Operations Branch.

Table 1 outlines the Ministry of Citizens' Services strategic planning priorities that are directly linked to the Information Access Operations Branch. Objective 3.2 identifies improving FOI request response times to provincial information access requests from the public. The 2008 baseline measure is set, along with future targets for improvement.

Table 1: Ministry of Citizens' Services Service Plan Priorities for IAO

Goals 3: Service Value – a trusted organization that maximizes benefits to clients and taxpayers						
Objective 3.1:		Value for money				
Objective 3.2:		Improved response times to provincial information access requests from the public				
Strategies:		<ul style="list-style-type: none"> • Demonstrate to citizens, clients and customers that our services are efficient and provide value for money. • Seek new opportunities to leverage the benefits of shared services. • Expand benchmarking and cost-efficiency measures to monitor the efficient use of public funds for internal government shared services. • Actively manage to statutory timelines for information access requests with Ministry customers. 				
Performance Measure	Baseline	2009/10 Forecast	2010/11 Target	2011/12 Target	2012/13 Target	
Compliance with statutory freedom of information response times	71% (2008)	86%	88%	90%	92%	

The Service Plan sets out performance measures and targets for processing freedom of information (FOI) requests and points out that this measure provides an indication of how well government is serving the public through the timeliness of its responses to FOI requests (Ministry of Citizens' Services, 2010).

Shared Services BC

At the division level, Shared Services BC has developed its vision, mission and goals. These are as follows:

Table 2: Vision, Mission, and Goals of Shared Services BC

Vision Statement: <i>Excelling in the provision of innovative, responsive, cost-effective and integrated services to the public sector.</i>
Mission Statement: <i>To provide shared support services for public sector organizations to better serve the people and businesses of British Columbia.</i>
Goals:
1. Maintain a high level of client satisfaction
2. Be accountable to our clients
3. Reduce unit and overall shared services costs

Operating principles (based on the three goals) have also been outlined to guide the design and operations of the organization. The operating principles are as follows:

Table 3: Operating Principles of Shared Services BC

<i>Focus on maintaining a high level of client satisfaction</i>
<ul style="list-style-type: none"> <i>client satisfaction will be a key measure of our success</i>
<ul style="list-style-type: none"> <i>processes will be designed to meet the needs of the clients while maintaining cost-effectiveness</i>
<ul style="list-style-type: none"> <i>governance and service delivery functions will be separated</i>
<ul style="list-style-type: none"> <i>we will create a high performing, learning organization</i>
<i>Reduce Costs</i>
<ul style="list-style-type: none"> <i>services and delivery processes will be designed to be cost-competitive with similar service delivery organizations in the private and public sectors</i>
<ul style="list-style-type: none"> <i>there will be no duplication of services</i>
<i>Be accountable to the client base</i>
<ul style="list-style-type: none"> <i>pricing of services must be competitive, clear and simple</i>
<ul style="list-style-type: none"> <i>Performance will be measured and reported</i>
<ul style="list-style-type: none"> <i>Clients will have recourse for non-competitive or poor service</i>

The strategic planning information, outlined in Tables 2 and 3, summarize Shared Services BC’s approach to service delivery to its clients. This information is helpful for guiding the design and efforts of the Information Access Operations Branch to help it be a successful shared services organization. The goals shown in Table 2, and the operating principles in Table 3, represent key priorities that need to be considered in the preparation of a balanced scorecard for the Information Access Operations Branch.

Information Access Operations Branch

Strategic planning has not yet taken place in IAO due to the relatively new age of the Branch. At present, all employees are involved in developing their own performance and development plans, known as employee performance and development plans (EPDP’s). Part of developing EPDP’s involves employees identifying individual key work goal that are aligned with the broader goals of the Branch. For employees, understanding the linkage between their work and the priorities of the broader organization is often unclear making it difficult to create alignment between their own individual key work goals and the broader goals of the organization. The Shared Services BC strategic planning information provides clear guidance on how the IAO Branch should be designed and how it should operate. Once the IAO Branch business unit balanced scorecard has been completed, employees will be better able to understand the connection between their jobs and the priorities of the Branch and Shared Services BC.

LITERATURE REVIEW

The Information Access Operations Branch is part of Shared Services BC; the organization responsible for delivering goods and services to the BC public sector using a shared services approach to service delivery. The following literature review examines the definition and benefits of shared services, the growing use of shared services in the public sector, followed by a review of best practices and drivers of shared services success in the public sector. We'll begin by looking at what defines "shared services", and why this approach to service delivery is being adopted by the public sector.

Shared Services Definition and Benefits

In their report on public sector shared services, Accenture defines shared services as:

"...the consolidation of administrative or support functions (such as human resources, finance, information technology and procurement) from several departments or agencies into a single, stand-alone organizational entity whose only mission is to provide services as efficiently and effectively as possible." (Accenture, 2005).

Burns and Yeaton describe the shared services model as being akin to an open market system (Burns & Yeaton, 2008). The provider and the client units enter into partnerships called service-level agreements on a "for fee" basis, similar to the way a company enters into an agreement with its customers (Burns & Yeaton, 2008).

In these definitions of shared services, a distinction is drawn between true shared services and consolidation. Consolidation is where services are funneled into an existing department as an add-on responsibility (Accenture, 2005). Shared services, on the other hand, are when there is a separate and distinct organization where administrative and support functions are the main focus and so are treated with primary importance (Accenture, 2005). They point out that, "...adopting true shared services operating models requires a dramatic transformation and corporate culture change that address business processes, policies, organizational structure, personnel management and technology" (Accenture, 2005).

The overall driver for implementing shared services is to reduce internal costs (Accenture, 2005). The main benefit is that it frees up resources so that departments and agencies can focus on their core business and their customer needs (Accenture, 2005). Other benefits identified in Accenture's report include: standardized processing, improved systems, and improved quality and speed (Accenture, 2005). Accenture also points out that, "shared services helps governments be more client-centred, outcome-oriented and accountable, by allowing governments to focus on their core responsibilities and to operate more efficiently" (Accenture, 2005).

Shared Services in the Public Sector

In the public sector, the use of shared services is growing. This growth is prompted by the desire to improve government service delivery and reduce costs. Accenture's report on driving high performance in government, argues that the use of shared services is helping governments address the difficult challenges that they face, including increased fiscal

pressures, due to the economic downturn, growing public expectations for more citizen centred services and greater accountability, and the impending labour shortages with the aging workforce (Accenture, 2005).

According to Accenture's report, high performing governments share a number of characteristics (Accenture, 2005). They generate maximum public value, are relentlessly citizen centred and outcome focused, their capabilities and operational activities all support the delivery of outcomes defined by their mission, and they measure their performance based on those outcomes (Accenture, 2005). Accenture describes high performing governments as being committed to cost-effectiveness, holding themselves accountable, and making their operations and results transparent to all. They are innovative and flexible, continually striving to improve value delivery, and they work in open and collaborative ways (Accenture, 2005).

Best Practices & Drivers of Shared Service Success

In their report on maximizing the value of public-sector shared services, Accenture identifies a number of leading practices that contribute to the success of shared service organizations. These practices include:

1. Gain leadership support/buy-in from politicians and senior management.
2. Develop a strong shared services business case, strategy and plan.
3. Create the shared services organization as a stand-alone entity.
4. Create a strong governance structure that includes user departments and service-level agreements.
5. Manage the workforce issues.
6. Ensure that the right enabling capabilities are in place.
7. Transform the internal culture.
8. Measure performance (Accenture, 2005).

A number of these drivers reflect practices that contribute to the successful implementation of shared services organizations.

Of the leading practices that Accenture identified, a number of them are set in motion through organizational strategic planning and strategic management. For example, the practices of developing a strategy and plan, (practice 2) transforming the internal culture (practice 7), and measuring performance (practice 8) can all be initiated through strategic planning and strategic management. In Accenture's report they discuss the importance of developing a strategy and plan at the onset, before initial deployment of the solution (Accenture, 2005). This is then used to scope out parameters and the distribution of roles and responsibilities to assist with successful implementation. Transforming an organization's internal culture, to one that is focused on client relations and service excellence, can be facilitated through strategic planning. Strategic planning material, created for an organization, can also be an important tool for communicating changes and strategic priorities to staff to assist in transforming the internal culture.

Accenture's report highlights the importance of measuring performance in shared services organizations (Accenture, 2005). Measuring performance (practice 8) includes developing

service performance metrics, and is essential for shared services organizations to make progress (Accenture, 2005). Accenture points out that, “performance management is a tool both to measure success and to provide the information and incentives to generate improvements” (Accenture, 2005). Howard and Wilson concur, pointing out that performance measurement is critical for achieving successful shared services implementation (Howard & Wilson, 2006). They argue that measurement should be addressed early in the shared services lifecycle and then managed as part of the overall governance structure (Howard & Wilson, 2006). Howard and Wilson assert that assigning accountability for metrics and key performance indicators is critical because it creates a more performance-oriented culture (Howard & Wilson, 2006). They point out that it clearly delineates responsibilities for both the shared services organization and its customers (Howard & Wilson, 2006).

Accenture also points out that the challenge for governments is to ensure that the focus is not just on dollar savings (Accenture, 2005). Of the executives they interviewed, equally important objectives included such things as: standardizing operations to achieve economies of scale, improving service levels for their end customers and better leveraging organization (or external) expertise (Accenture, 2005). Accenture points out that the balanced scorecard approach was implemented, or was in the process of being implemented, in many of these shared services organizations. For example, the Queensland Shared Services Implementation Office is introducing a balanced scorecard approach that is comprised of a range of indicators, including customer service and staff satisfaction measures (Accenture, 2005).

This review of shared services best practices reveals qualities that define high performing governments, as well as drivers of success for shared service organizations. Measuring performance, using the balanced scorecard approach, was identified as a best practice for, not only, tracking performance against defined performance metrics, but also for measuring success in other areas such as client satisfaction. The balanced scorecard approach has been praised for its incorporation of a range of success factors, and not simply dollar savings. The Queensland Shared Services Implementation Office used the balanced scorecard approach to ensure a balanced approach to performance measurement, with a range of success indicators.

Successful shared services organizations have a need to demonstrate their accountability to their clients, meet their customer needs, execute their strategy, improve their performance, align employee goals, and communicate their priorities to staff and clients. The next section will explore how the balanced scorecard approach can be used to address these organizational needs for public sector shared services organizations.

CONCEPTUAL FRAMEWORK

The Balanced Scorecard

The balanced scorecard is the conceptual framework that was used to link the vision, mission, and goals of Shared Services BC to the activities of IAO. This framework was selected because of its strength in communicating and linking strategy down to the departmental and individual level of an organization, and because it involves identifying objectives using four perspectives, thus giving it a more balanced approach.

The balanced scorecard is defined as:

“an integrated framework for describing and translating strategy through the use of linked performance measures in four balanced perspectives: Customer, Internal Processes, Employee Learning and Growth, and Financial.” (Niven, 2008).

The Balanced Scorecard was developed by Kaplan and Norton in the 1990s when they were exploring new methods of performance measurement for companies (Niven, 2008). Company performance was traditionally measured using financial measures of performance. Kaplan and Norton discovered that relying on financial measures alone was affecting companies' ability to create value (Niven, 2008). The new balanced scorecard included three additional perspectives for measuring performance: the customer perspective, the internal processes perspective, and the employee learning and growth perspective (Kaplan & Norton, 2007). The addition of the strategic non-financial performance measures gave managers and executive a more balanced view of organizational performance (Balanced Scorecard Institute). The balanced scorecard was effective because it enabled companies to track financial results while simultaneously monitoring progress in building the capabilities and acquiring the intangible assets they would need for future growth (Kaplan & Norton, 2007).

The balanced scorecard is a tool for achieving three main functions: 1) a performance measurement system, 2) a strategic management system, and 3) a communication tool (Niven, 2008). The measures that are selected for the scorecard are used by leaders to communicate to employees and external stakeholders the outcomes and performance drivers that will help the organization achieve its mission and strategic objectives (Niven, 2008). For this project, the balanced scorecard will be used for measuring performance, strategic management, and as a communication tool.

Balanced Scorecard Perspectives

The balanced scorecard approach proposes that organizations be viewed from four perspectives (Balanced Scorecard Institute). These four perspectives include: the customer perspective, internal processes perspective, employee learning and growth perspective, and the financial perspective.

The customer perspective is important because it involves understanding what your customer values and what the organization can propose to add value for its customers. Choosing objectives for the customer perspective of the strategy map involves organizations answering the following critical questions: 1) who are our clients, 2) what

must we do well to satisfy them, and 3) what do our clients expect or demand from you as an organization (Niven, 2008)?

Identifying objectives in the internal processes perspective involves an organization determining at what internal processes they must excel in order to achieve the customer expectations identified in the customer perspective. This perspective helps organizations assess how well their internal processes (products and services) are meeting customer requirements.

In the financial perspective, identifying objectives involves determining what is most financially critical to an organization. In the public sector, financial objectives ensure that organizations are achieving their results but in an efficient manner that minimizes cost (Niven, 2008).

The employee learning and results perspective is particularly important because it enables success in the other three areas (i.e. the customer, internal processes, and financial perspectives). Niven emphasizes this point, stating that, “in essence, they [objectives in the employee learning and growth perspective] are the foundation upon which this entire house of a Strategy Map is built” (Niven, 2008). Niven maintains that identifying objectives in this perspective involves discovering some gaps between the current organizational infrastructure of employee skills, information systems, and organizational climate (e.g. culture) and the level necessary to achieve the results you desire (Niven, 2008).

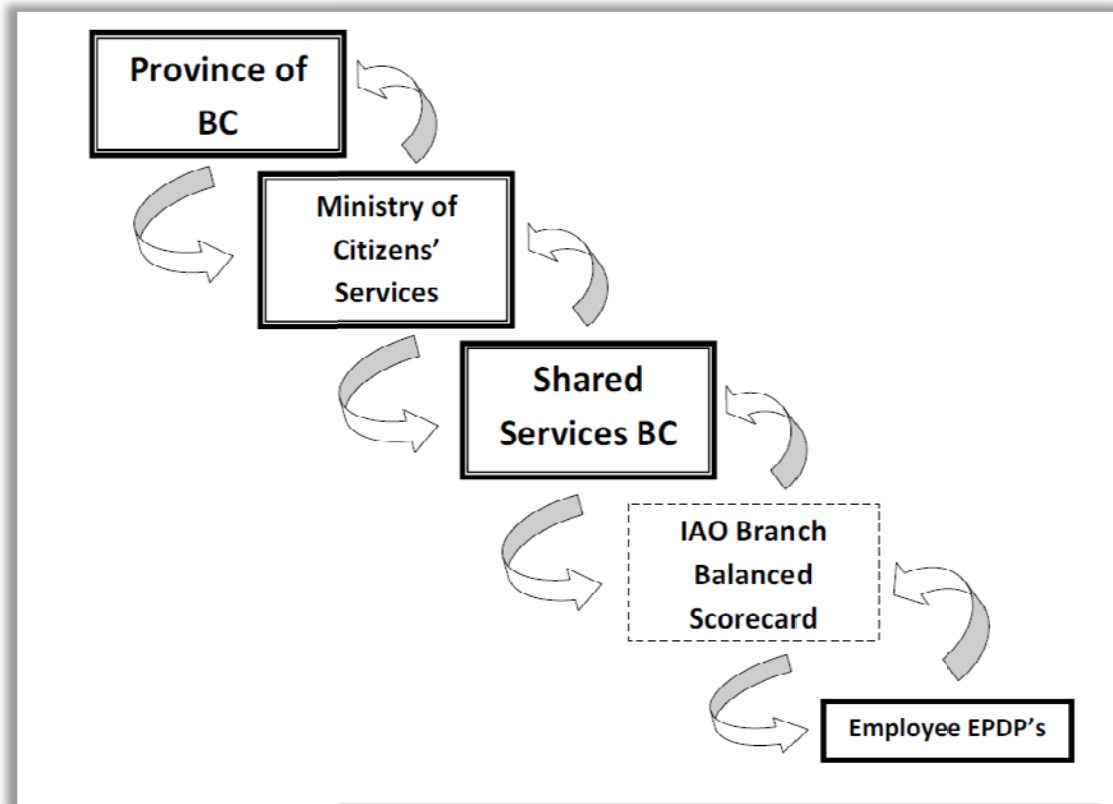
By developing performance objectives using the four perspectives (customer, financial, internal processes, learning and growth), organizations can achieve a “balanced” approach for executing their strategy.

Cascading the Balanced Scorecard to Create Alignment

Balanced scorecards are useful for aligning business activities to the vision and strategy of the organization (Balanced Scorecard Institute). This in turn, improves internal and external communications, and monitors organizational performance against strategic goals (Balanced Scorecard Institute). Cascading helps employees understand how their work contributes to the goals of their organization. As Niven points out, “a lack of alignment between personal objectives and broad organizational goals obscures any hope of discovering true meaning and contribution through work (Niven, 2008).

Figure 1 illustrates where alignment is currently needed. Strategic planning has occurred within Shared Services BC, and employees prepare an annual employee performance and development plan (epdp). The creation of an IAO business unit balanced scorecard will close the existing gap and will allow employees and teams to understand how their individual goals are aligned to IAO’s objectives and the goals of Shared Services BC.

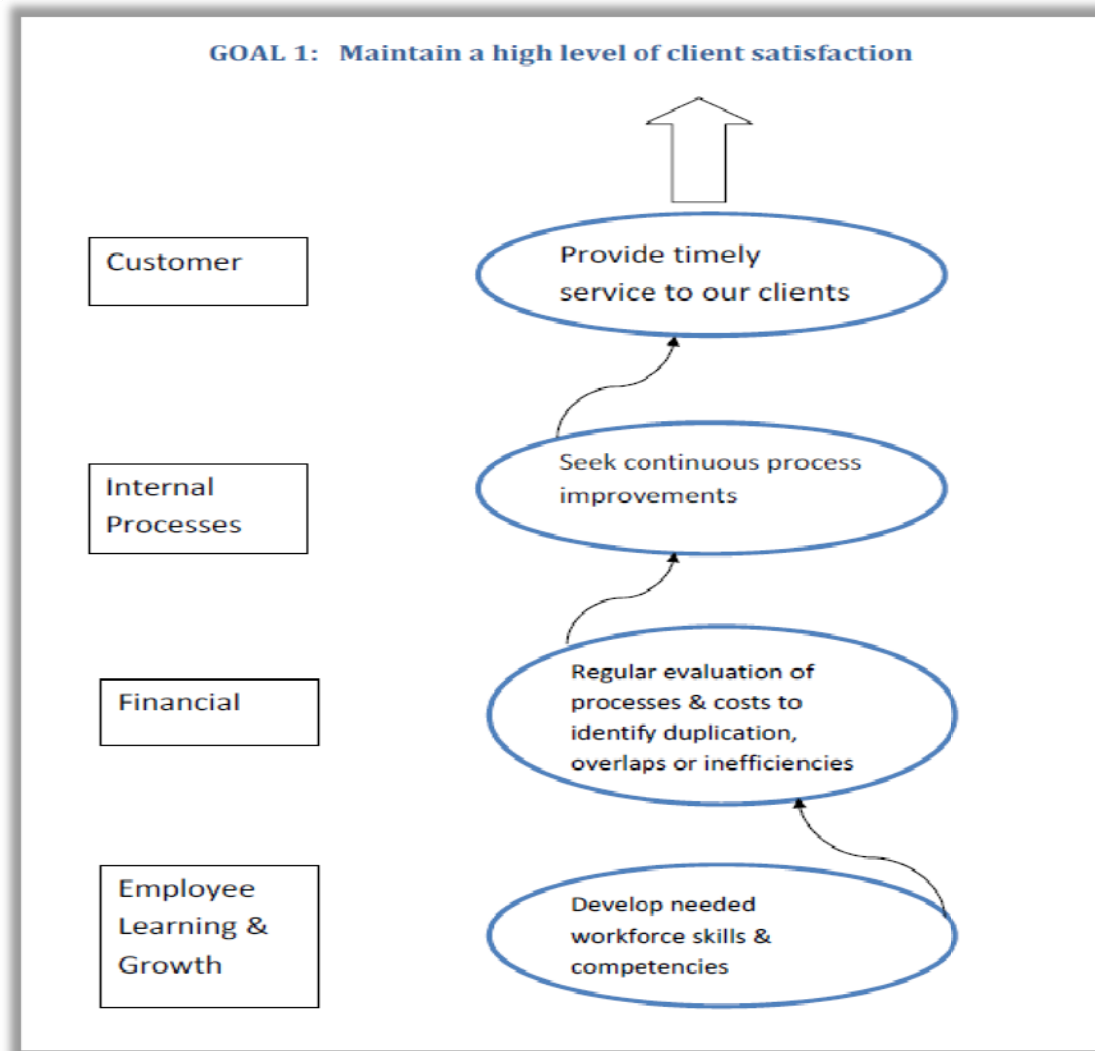
Figure 1: Cascading Alignment



Strategy Maps and Cause-and-Effect Relationship

Creating a balanced scorecard involves first developing performance objectives on a strategy map in the different balanced scorecard perspectives. The Balanced Scorecard Institute defines strategy maps as, "...communication tools used to tell a story of how value is created for the organization. They show a logical, step-by-step connection between strategic objectives (shown as ovals on the map) in the form of a cause-and-effect chain" (Balanced Scorecard Institute). The idea is to improve performance in the objectives found in the Employee Learning & Growth perspective (the bottom row) to enable the organization to improve its Financial perspective (the next row up), which in turn enables the organization to create desirable results in the Internal processes perspective to create Customer and Financial perspectives (the top two rows). This concept is illustrated in Figure 2 using a sample cause-and-effect set of performance objectives.

Figure 2: Cause-and-Effect Linkages



Adapted from: Niven, P.R. (2008). *Balanced Scorecard: Step-by-step for Government and Nonprofit Agencies*. New Jersey: John Wiley & Sons, Inc.

Implementing and Measuring a Balanced Scorecard

The final step in creating a balanced scorecard involves developing a balanced scorecard measurement system, made up of performance measures, targets, timelines, and initiatives. The measurement system also assists with implementing the balanced scorecard. Developing the balanced scorecard measurement system involves establishing performance measure, targets, timelines and initiatives for each of the objectives on the balanced scorecard.

It is important to define performance measure, targets, timelines and initiatives, as these terms are referred to throughout this report. Niven defines performance measures as standards used to evaluate and communicate performance against expected results (Niven,

2008). He argues that measures, "...provide insight into whether we are achieving our stated objectives and foster accountability for results, ensuring we maintain the course of implementing our strategy" (Niven, 2008). Performance targets represent the desired result of a performance measure (Niven, 2008). They also inform the organization of the expected level of performance required to achieve success (Niven, 2008). Timelines represent the desired time frame (e.g. 6 months, 1 year) in which the performance objective (or individual initiatives) will be achieved. Initiatives are the specific programs, activities, projects, or actions you will engage in to help ensure you meet or exceed your performance targets (Niven, 2008). Together, performance measure, targets, timelines and initiatives form the balanced scorecard measurement system and implementation framework.

For this project, the balanced scorecard will be used as a strategic management system, a performance measurement system, and as a communication tool. Creating alignment will help IAO in their transformation to a shared services model of service delivery by determining what it must do well in to support the three goals of Shared Services BC. As a performance measurement system, performance measures will be identified for each of the objectives to describe how success will be measured. As a communication tool, the balanced scorecard will help communicate IAO's key priorities both internally to staff and externally to its clients. Staff will have a greater understanding of their role in the Branch's success. The balanced scorecard will also help IAO improve its accountability to its clients and communicate its priorities.

METHODOLOGY

Research Design

In order to identify performance objectives for IAO, focus group sessions were held with the two different work units that are part of IAO. The two work units within the Branch include FOI Operations and Records Management Operations. The data collection component of this project involved 2.5 – 3 hour focus group sessions with each of these work units. The two focus groups were held separately because the work of these two work units differs significantly. The separate sessions helped ensure that a full discussion could occur in each subject area.

In each of the focus group sessions, performance objectives were developed for the Branch to link it to the three goals (operating principles) of Shared Services BC. The researcher focused on the three goals of Shared Services BC for creating alignment, rather than its mission statement because the goals outline the operating principles for Shared Services BC and were designed with the input of its client base and best practice. This approach was used to help participants develop performance objectives through a shared services lens.

After performance objectives were identified, performance measures, targets, timelines and initiatives were identified for each of the key performance objectives. This step was designed to initiate a plan for implementing the performance objectives that were identified by the group.

Data Collection Strategies

Data collection occurred during two separate focus group sessions with each of the two work units within the Information Access Operations Branch. Focus groups were used because it was anticipated that a group setting would help: generate the flow of ideas amongst the participants, assess reactions to proposed objectives, create group consensus, and access the collective memory of the group.

Sampling Strategies

Eight to twelve participants were selected for each of the two focus group sessions. The different organizational structure of the two work units required different approaches to participant recruitment. The general approach was to select more senior staff members within each of the two main work units.

Focus group 1 involved staff in the records management work unit. Twelve participants were involved, and included senior staff, a Manager and a Director who provide records management services. This focus group also included another Branch Director and the Executive Director. Their involvement and input was considered crucial for supporting the Branch priorities that would be decided on in the focus group session. The process of selecting participants was made in consultation with the Director of Records Management Operations. Senior staff members were recruited from each team to ensure that the ideas generated in the focus group session would include representative of the records management work unit.

Focus group 2 involved staff members from the Freedom of Information work unit. Eight participants were involved, and included members of the management team for the access to information work unit, as well as the Branch Director and Executive Director. Again, the involvement of the Director and Executive Director was considered crucial for supporting the Branch priorities that would be decided on in the focus group session. Managers from each of the teams were recruited to ensure representative across the entire access to information work unit.

Design of Instruments

A workbook was created to guide the focus group participants in achieving the following two goals: 1) define performance objectives for the Information Access Operations Branch, that would align it with Shared Services BC, and 2) identify performance measures, targets, timelines and initiatives for each of the key objectives that were identified. For both of the focus group sessions, the following five steps were followed to assist the group in achieving the two above goals:

1. Review purpose of study and confidentiality information
2. Explain the balanced scorecard approach
3. Review vision, mission, and goals of Shared Services BC
4. Define objectives for the Information Access Operations Branch and then screen objectives to a maximum of five
5. Identify performance measures, targets, timelines and initiatives for each of the objectives

This workbook was circulated to participants in advance of the focus group sessions. The first step in the focus group sessions started with a review of the purpose of the project and why a balanced scorecard was currently needed for IAO. Step two involved review the balanced scorecard approach, explaining its history and why it was created, and then reviewing why it would be beneficial for IAO. The process of developing cause-and-effect linkages between the objectives in the four balanced scorecard perspectives, was also reviewed so that participants would better understand why objectives should be identified in all four perspectives. The third step involved looking at the vision, mission, and goals of Shared Services BC, to improve the group's understanding of the strategic planning information that had already been established for the Branch.

Step four is where the group ideas and discussions started. Objectives were defined and reviewed with the group to clarify what the group would be looking to develop. The first question in the focus groups was to identify who their clients were. Following that, the group was asked what their clients expect or demand from them as an organization. Responses were recorded on a presentation easel pad as "client expectations" and displayed on the wall. Identifying client expectations set the stage for the next steps which were to brainstorm performance objectives in the four balanced scorecard perspectives (customer, internal processes, financial, and employee learning and growth). The facilitator asked the groups questions which would prompt the identification of performance objectives in each of the four balanced scorecard perspectives. The questions were as follows:

- 1) Customer Perspective: What must we do well to satisfy our customers, be accountable to our clients, and reduce our unit and overall costs?
- 2) Internal Processes Perspective: At which processes must we excel if we are to meet our client needs, be accountable to our clients, and reduce our unit and overall costs? How are we going to accomplish the objectives that we have set out for our two clients?
- 3) Financial Perspective: Financially, what is most critical to us: enhancing productivity, utilizing our assets more efficiently?
- 4) Employee Learning and Growth Perspective:
 - What skills and competencies do we require to succeed and execute our strategy?
 - Do our employees have the technology tools they require to meet customer requirements and execute our strategy?
 - Do we have the proper organizational climate (culture, alignment, teamwork) necessary for success?
 - What measures do we currently use to gauge our success?

Responses were recorded on easel pad paper under each of the four perspectives. In other words, "client perspective" objectives were identified on one page, "financial perspective" objectives on another page, etc.

Once the group completed the process of brainstorming objectives, the objectives were reviewed and screened to identify the top five performance objectives. The facilitator suggested narrowing to approximately five performance objectives, with at least one being

in each of the four balanced scorecard perspectives. The overall goal was to develop approximately 8-10 performance objectives for the Branch. With two focus group sessions taking place, it seemed fitting to develop approximately five performance objectives per group. The facilitator explained the benefit of reviewing and reducing the number of objectives, as each objective would spawn multiple initiatives. The process of screening the objectives group was done through discussion and group consensus. Once the key performance objectives were identified, the next process involved identifying performance measures, targets, timelines and initiatives for each objective.

Following the focus group session, the participants were asked to review the results and provide feedback. This step was used to ensure that the ideas and results that the group identified were accurately captured. The other purpose of this step was to keep the participants engaged in the process of developing the balanced scorecard.

Methods of Analysis

The key performance objectives identified in each of the two focus group sessions would be compared against each other to identify areas of overlap or commonality. If commonality occurred, the objectives would be considered shared objectives and would amalgamated into a single objective.

Strengths & Limitations

One of the strengths of this project was that the participant response rate was high. This resulted in good representation across the Branch. Another strength was the presence of Director(s) and the Executive Director at each focus group session. Their involvement was important for confirming that the objectives, measures, targets, timelines, and initiatives were feasible for the Branch and would be supported at the more senior levels of the organization. The design and use of the workbook was another strength as it allowed the groups to proceed through the various steps and achieve significant results within 2.5 – 3 hours.

One of the limitations of this methodology was that not all Branch staff could be involved in this objective setting process. There are 148 staff members in the Branch and the focus group setting that was needed to generate these findings was not conducive to this number of participants. Another limitation of this project is that additional time would be needed to fully complete the implementation plan. Initiatives, targets, timelines and performance measures were generated for each of the key objectives; however, an implementation plan would be strengthened by spending more time setting out the balanced scorecard implementation and measurement plan. There may be opportunities to further develop the implementation and measurement plan through the involvement of more Branch staff.

FINDINGS

Data collection occurred over two focus group sessions. The first focus group involved twelve participants; ten senior records management operations staff members (including a manager and director), as well as a Branch director and executive director. The second focus group involved eight participants; six managers of the access to information teams, and the team director and executive director. Following these focus groups sessions, the findings were recorded and circulated to the participants for their review, to ensure that the information was recorded accurately and captured the ideas that were identified by the group. The focus group findings are summarized below.

Identifying Client Expectations

Before identifying performance objectives for the Branch, each focus group began by what their client's expect from them as an organization. Identifying client expectations was important first step in the focus group sessions as it helped participants think about, and the service outcomes that our clients require. The results are summarized in

Table 4 and Table 5.

Table 4: Records Management Client Expectations

Records Management services:

- ❖ Clear, reliable and timely advice
- ❖ Staff training to ensure that they are in compliance with policy and legislation requirements & systems training
- ❖ Secure and cost-efficient storage, retrieval & destruction of records
- ❖ Develop effective and efficient tools to manage electronic and paper information
- ❖ Leadership for best practices (guidelines & policies)
- ❖ Good communication
- ❖ Quality Assurance role e.g. records management reviews
- ❖ Records management clean-up projects
- ❖ Develop Operational Records Classification Systems (ORCS)
- ❖ Innovative solutions to records management challenges

Table 5: FOI Client Expectations

FOI services:

- ❖ Provide timely responses to FOI requests
- ❖ Provide expertise, sound advice
- ❖ Facilitate compliance with FOIPPA
- ❖ Ensure quality service
- ❖ Corporate knowledge of ministry mandates and programs
- ❖ Timely and accurate reporting and measuring
- ❖ Innovative responses to managing access requests
- ❖ Clear two way communication, receive updates
- ❖ Safeguard and protect sensitive information
- ❖ Trusted advisor to Ministries and the public
- ❖ Staff will be available and accessible
- ❖ Provide training
- ❖ Provide cost-effective service

The records management focus group participants identified their clients as: ministry boards, agencies, and commissions.

Table 4 lists the client expectations that were identified by the records management operations focus group participants. Client expectations focus around assisting their clients to meet their obligations under the *Document Disposal Act*, and other legislation, by providing records management advice and training, and ensuring that there are effective tools, resources, and systems available to clients to manage their records.

The FOI focus group participants identified their clients as their ministry clients and the general public (FOI applicants). Table 5 lists the client expectations that were identified by the FOI focus group participants. Client expectations focused around assisting their ministry clients to meet their obligations under the *Freedom of Information and Protection of Privacy Act*, as well as ensuring that the Branch meets its own service requirements under this Act. Client expectations also focused around providing expertise and advisory services to client ministries.

A number of themes can be drawn from the client expectations identified in Tables 4 and 5. The first theme is the advisory role that the Branch carries out for its clients. As subject matter experts, the Branch provides advice and expertise to its clients. The second main theme is the Branch's role to educate its clients, to help them acquire the knowledge needed to meet their legislative requirements. The third main theme is the role that the Branch plays in developing innovative solutions and tools to help their client's efficiently meet their legislative requirements. Accountability was identified as the fourth theme. The Branch's clients expect that services will be provided in a timely manner, that results will be reported out on, and that services will be cost-effective.

The process of defining who the Branch's customer was, as well as outlining client expectations, helped set the foundation for the next step in the focus groups; developing performance objectives for the Branch in the client perspective.

Identifying Performance Objectives for the Information Access Operations Branch

Identifying performance objectives for the Branch involved brainstorming performance objectives in response to the client expectations that were identified, and in line with the three goals of Shared Services BC. Performance objectives were identified by each focus group in the four balanced scorecard perspectives. The full list of performance objectives, identified by each focus group, can be found in Appendix E: List of Performance Objectives. After the full list was completed, participants looked for 5-6 of the most important performance objectives, identifying at least one in each of the four balanced scorecard perspectives. The results generated by each focus group were amalgamated into a single list of nine performance objectives for the Branch.

To help understand the performance objectives that were identified, they have been written out as objective statements. The following list of nine performance objectives represents a consolidation of the performance objectives from both of the focus groups. Where overlap occurred, the objectives were amalgamated into a single objective. In two cases, a performance objective was moved into a different balanced scorecard perspective. This was necessary for either of two reasons: 1) both focus groups identified the same performance objective but had placed it in different balanced scorecard perspectives, or 2) it was a better fit in another perspective and moving it helped to reflect the cause-and-effect relationship shown in the strategy map. The Records Management focus group identified six key objectives, and the FOI focus group identified five key objectives. Two of the objectives identified by each group were considered common objectives and were amalgamated. In total, nine objectives were identified for IAO.

Objectives from the Customer Perspective

1. **Create & maintain positive partnerships & relationships with our clients** - the work of IAO involves working collaboratively with our clients to assist them in meeting their statutory obligations. To do this, it is critical that IAO create and maintain partnerships and relationships with our clients.
2. **Meet statutory obligations** – IAO is responsible for assisting our clients so that they can meet their statutory obligations under the *Freedom of Information and Protection of Privacy Act* and the *Document Disposal Act* and other legislation. To achieve this objective, IAO must ensure that it has the internal skills and processes in place to meet its service standards.

Objectives from the Internal Processes Perspective

3. **Develop a communication plan** – two-way communication with our clients is critical for maintaining client satisfaction. To achieve this objective, IAO must effectively communicate to its clients, the importance of meeting their statutory obligations under the *Freedom of Information and Protection of Privacy Act* and the *Document Disposal Act* and other legislation.

4. **Rationalize & simplify processes to meet client needs and create efficiencies** – providing high quality and cost-effective services are important to our clients. To achieve this objective, we must simplify our processes and create efficiencies.
5. **Ensure quality assurance & regularly report our results** – as a shared services organization, we must monitor the quality of our work and be accountable to our clients by reporting on our results. IAO will achieve this objective by developing plans for quality assurance and performance reporting.

*Objectives from the **Financial Perspective***

6. **Reduce costs by being efficient and creating value** – as a shared services organization, creating better value for our customers involves looking for ways to reduce the cost of our services. To achieve this objective, we must utilize our human resources and technology tools as effectively as possible.
7. **Define core services & create service agreements** – to be accountable to our clients, our Branch must define our core services and create service agreements with our clients. Achieving this objective is crucial for defining performance metrics to measure and report on our results.

*Objectives from the **Employee Learning & Growth Perspective***

8. **Create a learning organization to improve staff competencies & develop needed workforce skills** – our Branch needs to be an organization that is committed to continually learning and developing our skills. To achieve this objective, it is the responsibility of everyone in the Branch to take ownership of their learning needs, in line with the learning needs of the Branch.
9. **Rationalize job descriptions & classifications & determine what skills are needed for each position** – as a new organization, it is important that our job descriptions and classifications are rationalized, and that we determine what skills are needed for each position. We will achieve this objective by reviewing job classifications where discrepancies exist, reviewing our job descriptions and job profiles, and identifying what skills are needed for each position.

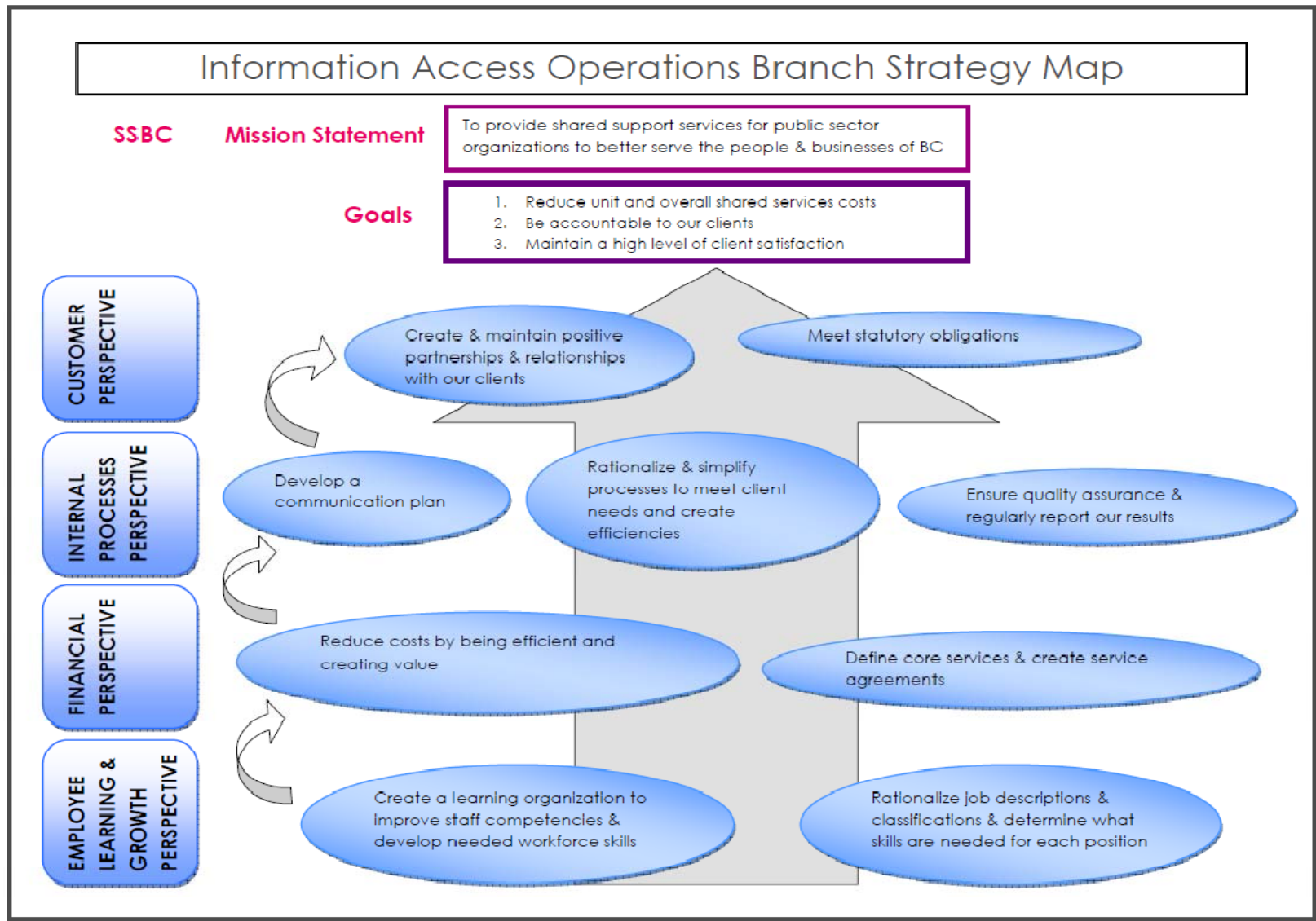
Strategy Map of Performance Objectives

IAO's strategy map is part of the balanced scorecard framework. It is a visual representation of the performance objectives for the Branch, and their relationship to the four perspectives of the balanced scorecard, and the goals and mission of Shared Services BC.

A strategy map was created to show the nine objectives and their cause-and-effect relationship with one another. The strategy map shown in Figure 3 illustrates the consolidated performance objectives for the entire Branch. The objectives in the strategy map are linked together in a cause-and-effect chain. By improving performance in the objectives in the employee learning and growth perspective (the bottom row), the Branch will enable improvements in the financial perspective objectives (the next row up). For example, creating a learning organization and developing needed workforce skills (employee learning & growth perspective) drives the success

of reducing costs by being efficient and creating value (financial perspective). The objectives in the financial perspective in turn enable the Branch to improve its performance in the internal processes perspective (the next row up). Improvements in the Branch's internal processes perspective enable improvements in the objectives in the customer perspective (top row). For instance, developing a communication plan (internal processes perspective) will enable success in creating and maintaining positive partnerships and relationships with clients (customer perspective). The performance objectives in the customer perspective (the top row) support the achievement of the mission statement and three goals of Shared Services BC. For example, meeting statutory obligations (customer perspective) will help IAO maintain a high level of client satisfaction and be accountable to its clients (goals of Shared Services BC).

Figure 3: IAO Strategy Map of Objectives



Measuring the Performance Objectives: Identifying Performance Measures, Initiatives, Targets, and Timelines

To assist in measuring, monitoring and implementing the performance objectives shown on IAO’s strategy map, an implementation plan was initiated. Table 6 identifies IAO’s nine performance objectives, and their associated performance measures, initiatives, targets, and timelines. This table incorporates the performance objectives, measures, initiatives, targets and timelines for both records management and FOI into a single implementation and measurement plan for the Branch. The performance measures identify how we will measure the success of each performance objective. The initiatives identify what specifically the Branch will do to achieve each of the objectives. The targets reflect the desired result of the measure, and the timelines note the timeframe for achieving each of the initiatives.

Table 6: IAO’s Key Performance Objectives, Measures, Initiatives, Targets & Timelines

BALANCED SCORECARD PERSPECTIVE	OBJECTIVE	MEASURE	INITIATIVE	TARGET	TIMELINE
Customer	1. Create and maintain positive partnerships and relationships with our clients	To be identified	<ul style="list-style-type: none"> ➤ Create means of obtaining client feedback (e.g. surveys, client evaluation forms) ➤ Determine means of communicating with clients (at all levels) ➤ Obtain and incorporate client feedback and input ➤ Establish links with Directors of Client Relations 	To be identified	1 year
	2. Meet statutory obligations	To be identified	<ul style="list-style-type: none"> ➤ Recruiting and training ➤ Create awareness, increase knowledge ➤ Identify client ambassadors ➤ Ensure quality assurance ➤ Improve client relationships 	To be identified	To be identified

BALANCED SCORECARD PERSPECTIVE	OBJECTIVE	MEASURE	INITIATIVE	TARGET	TIMELINE
Internal Processes	3. Ensuring quality assurance and reporting results on a regular basis	To be identified	<ul style="list-style-type: none"> ➤ Define performance measures ➤ Develop baseline, conduct gap analysis, analysis of tools ➤ Assess technological gaps and areas in need of improvement ➤ Utilize project management tools and resources ➤ Clarify priorities ➤ Ensure sufficient resources ➤ Develop a performance management system 	To be identified	1 year
	4. Develop a communication plan	<ul style="list-style-type: none"> - Client satisfaction measures on client survey - Positive feedback 	<ul style="list-style-type: none"> ➤ Develop a communication plan ➤ Develop a client feedback survey ➤ Finalize website ➤ Identify client contacts in ministries and agencies ➤ Communicate roles and responsibilities 	To be identified	
	5. Rationalize and simplify our processes to meet our client's needs and to be more efficient within the Branch	To be identified	<ul style="list-style-type: none"> ➤ Re-evaluate processes ➤ Develop policy approval processes (who signs what) ➤ Simplify and rationalize current internal processes (less accession numbers on system) ➤ Revise ORCS within IAO ➤ Develop training plan and training schedule ➤ Review application processes 	To be identified	1 year
Financial	6. Define core services and create service agreements	Staff and client understanding of roles and responsibilities	<ul style="list-style-type: none"> ➤ Define core services ➤ Develop service level agreements 	To be identified	6 months

BALANCED SCORECARD PERSPECTIVE	OBJECTIVE	MEASURE	INITIATIVE	TARGET	TIMELINE
	7. Reduce costs by being efficient and creating value	To be identified	<ul style="list-style-type: none"> ➤ Implement EDRMS ➤ ORCS development ➤ Develop in house expertise ➤ Expand RCS client base and services ➤ Complete backlog approvals 	To be identified	Target for EDRMS, ORCS development & complete backlog approvals is to meet annual development plan
Employee Learning & Growth	8. Create a learning organization to improve staff competencies and develop needed workforce skills	Results of Work Environment Survey (WES)	<ul style="list-style-type: none"> ➤ Create cross-training opportunities ➤ Change attitudes and motivate staff ➤ Create internal “foreign exchange program” between teams ➤ Improve employee engagement ➤ Create skills database ➤ Manage HR risks ➤ Management team to develop epdp goal to support this objective ➤ Outline career paths ➤ Develop succession planning (e.g. plan for future retirements) to maintain corporate knowledge ➤ Skills gap analysis ➤ Identify training opportunities ➤ Job rotation ➤ Cross training ➤ Co-op training ➤ Mentorship ➤ Recruit ➤ Develop training plan 	To be identified	1-2 years & ongoing

BALANCED SCORECARD PERSPECTIVE	OBJECTIVE	MEASURE	INITIATIVE	TARGET	TIMELINE
	9. Rationalize job descriptions & classifications and determine what skills are needed for each position	To be identified	➤ Review job descriptions and classification	To be identified	1 year

Focus group participants identified initiatives that the Branch could engage in to help support the achievement of each objective. As subject matter experts, participants were able to easily identify what specific activities (i.e. initiatives) needed to occur to achieve each objective. The initiatives that were identified indicate that participants were clear on what the Branch needed to do to move forward as an organization. For example, initiatives such as implementing electronic tools, completing backlog approvals, defining core services, and clarifying priorities, were all linked to their respective objective which in turn supports the mandate of the Branch. For a number of the performance objectives, the list of initiatives was lengthy. When the implementation and measurement plan is revisited, participants may wish to prioritize these initiatives to reflect the resource that are available to devote to each initiative.

The focus group participants found that the task of identifying related performance measures, targets, and timelines was more challenging. This may reflect the quantity of discussion that was covered during the focus group sessions. Where more time needs to be spent completing these sections, they have been labeled ‘to be identified’. The Branch would benefit from devoting a full session to complete these sections of the implementation and measurement plan. During this session, responsibility should also be assigned to each of the initiatives to improve the Branch’s accountability in meeting its targets. A number of the initiatives will require a coordinated effort between different teams within the Branch. When this occurs, an initiative “lead” may need to be assigned. The next section will examine the implications of these focus group findings.

DISCUSSION

The two focus groups brought together a total of twenty of the most senior staff members within IAO. The process of bringing together participants in each of the focus groups, reviewing the strategic planning information of Shared Services BC, and then identifying performance objectives for the Branch, helped the participants identify what the Branch needed to do well in to be a successful shared services organizations.

Before the groups started the process of identifying objectives, client expectations were identified and were used from that point onwards as a starting point for developing performance objectives in the customer perspective. Given the customer-focused mandate of Shared Services BC (i.e. to provide innovative, responsive and cost-effective services to the public sector), this approach appropriately set the stage for the development of customer-focused performance objectives.

Alignment of the Branch with Shared Services BC

The performance objectives that were identified in the focus groups successfully aligned with the Shared Services BC approach to service delivery. This is outlined below by identifying how each of the focus group objectives aligns with one of the three goals of Shared Services BC. The bullets represent the performance objectives identified for the Branch.

Goal #1: Reduce Unit and Overall Shared Services Costs

- Rationalize & simplify processes to meet client needs and create efficiencies
- Reduce costs by being efficient and creating value

Goal #2: Be Accountable to our Clients

- Ensure quality assurance & regularly report our results
- Meet statutory obligations
- Define core services & create service agreements

Goal #3: Maintain a High Level of Client Satisfaction

- Create & maintain positive partnerships & relationships with our clients
- Develop a communication plan
- Create a learning organization to improve staff competencies & develop needed workforce skills (through cause-and-effect linkages, this employee learning & growth objective will enable achieving client satisfaction)
- Rationalize job descriptions & classifications & determine what skills are needed for each position (through cause-and-effect linkages, this employee learning & growth objective will enable achieving client satisfaction)

As shown, the objectives identified in the focus groups align well with the three goals of Shared Services BC. Consequently, the business unit scorecard for the Branch has effectively aligned to the strategic priorities and operating principles of Shared Services BC.

Key Priorities and Critical Success Factors

The development of performance objectives for the Branch revealed a number of key priorities and critical success factors for the Branch. Some performance objectives reflected the fact that the Branch is still in its implementation stage as a shared services organization. Other performance objectives are less time bound and may appear as ongoing performance objectives for the Branch.

One of the performance objectives identified in both focus groups, that reflected the early implementation stage for the Branch, was the need to define the Branch's core services and develop service agreements. Both groups identified this as critical for the Branch's success. Literature on shared services leading practices argues that creating service-level agreements is important for developing a strong governance structure. Accenture's report indicated that, "they are an integral component of the governance model because they remove ambiguity, at least in theory, about service expectations, quality standards, performance measures, costs and the relative roles and responsibilities of the shared services provider and the client agency for each service area" (Accenture, 2005). Both groups identified developing service agreements as a key milestone for moving the Branch forward. Once these are in place, the Branch will be better positioned to define its performance metrics, as well as develop customer feedback tools and service improvement plans.

Another performance objective that reflected the early implementation stage for the Branch, was the need to rationalize job descriptions and classifications and then determine what skills are needed for each position. This performance objective reflects the fact that the process of bringing together staff, who previously worked within teams in different ministries into a single Branch, has revealed discrepancies between job classifications. This performance objective is also likely to be time bound and may not appear as a performance objective in future years once this activity has taken place.

The importance of developing a communication plan was repeated throughout the records management focus group. The work of the records management staff involves helping client ministries meet their legislated and policy requirements regarding the management of recorded information. This involves the Branch providing its clients with easy to access information and tools so that they can achieve these requirements. For client ministries, managing recorded information is not core to their organizational mission, and therefore, one of the key challenges for records management staff involves effectively communicating the importance of good records management practices to their clients. Their role as advisor and influencer was identified as important during the focus group. The group identified that their work involves helping their clients understand the importance of good records management and communicating the risks of insufficient resourcing in this area. This objective was identified as so important for the group's success that staff training in communication, and acquiring a communication specialist position within the team were put forward as strategies for achieving this objective. As a shared services organization, communicating effectively with clients will continue to be critical for this groups continued success.

Although communicating with clients was not identified as one of the key objectives in the FOI focus group session, communication was identified a number of times during the objective identification process. In the area of communicating with client ministries, the FOI focus group identified, “superior communication and engagement, with the ability to ask questions and extract information”, “create awareness – provide clarification, information, peace of mind, user friendly tools and support”, and “creating and maintaining partnerships and relationships with our clients.” Considering the nature of this group’s work, and the cooperation that is required with its clients in order for the FOI teams to meet a number of their statutory requirements, effective communication with clients is also critical for the team’s success.

In Accenture’s report on shared services, having open communication with clients was identified as an important part of building client confidence and customer-focused cultures (Accenture, 2005). They characterize this as an important part of transforming the internal culture of the shared services organization, by focusing on client relationships and service excellence (Accenture, 2005). The importance of communicating effectively with their clients will be an ongoing priority for the Branch.

Another key objective identified during both focus group sessions was to create a learning organization to improve staff competencies and develop needed workforce skills. This was seen by both groups as a driver for achieving the customer and internal processes objectives that were identified. Accenture’s report also identifies the importance of training and development. They point out that, “a strong training and development ethos will also help to create a culture of continuous improvement within the shared services organization” (Accenture, 2005). A culture of continuous improvement, they argue, is a key feature of high-performance shared services organizations (Accenture, 2005).

Balanced Scorecard Implementation & Measurement

The purpose of developing performance measures, initiatives, targets and timelines for each of the key objectives was to initiate an implementation and measurement system for the Branch’s business unit balanced scorecard. The process required participants to think about what was required to achieve each objective and then identify initiatives that the Branch could engage in to achieve each key performance objective. Focus group participants were able to identify initiatives and general timelines for achieving each objective; however, the groups had more difficulty identifying related performance measures and targets. This was likely due to the fact that the Branch was recently created and discussions around the extent of the services that it will provide to its clients are still underway. Before the consolidated Branch was created, some individual teams provided additional services to their clients that were secondary to their core services. Once consolidated, there has been uncertainty as to whether these additional services will continue.

Focus group participants pointed out that once the identification of core services and the development of service agreements was completed, appropriate performance metrics could more easily be identified and tools for obtaining client feedback could be created. Once service agreements have been completed, the Branch may wish to engage in additional discussions to further identify performance measures and targets that will help the Branch measure and report on its results. Accenture’s report highlights the importance of

developing service performance metrics. They state that, "...the development of service performance metrics is critical to helping the shared services organization make progress" (Accenture, 2005). Accenture argues that performance management is a tool for both measuring success and providing the information and incentives to generate improvements (Accenture, 2005). For IAO, establishing performance metrics is an important part of establishing accountability in the execution of the Branch's strategy. Accountability can also be improved by spending additional time assigning responsibility to each of the initiatives. The Branch may also wish to prioritize these initiatives depending on resource availability.

CONCLUSION

The goal of this project was to create a business unit balanced scorecard for the Information Access Operations Branch, to strategically align it to the three goals of Shared Services BC. The balanced scorecard framework was successful at creating alignment; the performance objective developed by the Branch aligned well with the three goals of Shared Services BC. The focus group sessions were valuable because they gave senior staff the opportunity to gain a better understanding of the strategic context of Shared Services BC and consider what the Branch needs to excel at in order to support these strategic goals and add value for its customers. These ideas are reflected in the strategy map which shows the connection between the strategic objectives in the form of a cause-and-effect chain. As a strategic planning tool, the balanced scorecard also sets out the strategies for IAO's future growth. Priorities such as clarifying roles and responsibilities and drafting service agreements will help move the Branch forward and will help provide a framework for further improvements. The implementation plan maps out a general framework for achieving and measuring the objectives, outlined through performance measures, initiatives, targets, and timelines. The balanced scorecard and strategy map will be useful tools for communicating the Branch's strategic objectives, both internally to staff and externally to its clients.

The types of performance objectives identified in the focus group sessions (e.g. defining core services, creating service agreements, and rationalizing job descriptions) made it clear that the Branch was still in the early stages of forming and implementation. Because of this, the Branch may wish to re-visit and updated the balanced scorecard within six months to one year's time as the Branch progresses. Once service agreements have been developed, it will be easier to develop performance metrics for IAO, as well as tools for measuring client feedback (e.g. surveys).

The following three recommendations were prepared for the Information Access Operations Branch to help ensure that IAO's business unit balanced scorecard is successfully implemented and that its current and future benefits are fully realized. Sustaining the success of IAO's business unit balanced scorecard will involve updating the scorecard on an ongoing basis to ensure that it remains current.

RECOMMENDATIONS

The following recommendations are made to the Information Access Operations Branch, to encourage successful implementation of the balanced scorecard, and future success using the balanced scorecard framework:

- 1. Communicate the Branch balanced scorecard, strategy map and implementation plan to staff.**

Communicating the balanced scorecard to staff is a key step in implementation, particularly for those staff members who did not participate in the focus group session. To date, a number of steps have already taken place to communicate IAO's balanced scorecard to staff. In June 2010, the researcher provided an overview of IAO's balanced scorecard to all staff in the Branch meeting. Following this staff meeting, the balanced scorecard and strategy map were posted on the Branch SharePoint site for staff to access and reference when they prepare their annual EPDPs. In addition, during the Branch staff meeting, all staff participated in a flip chart exercise in small groups. The groups identified their top three suggestions for accomplishing four (of the nine) performance objectives on IAO's balanced scorecard. This brainstorming exercise engaged the entire Branch in developing strategies for achieving a number of the objectives set out on the balanced scorecard. It is recommended that the Branch balanced scorecard plan (found in Appendix A) be communicated to all staff within the Branch. It is also recommended that the Branch continue to communicate progress made on IAO's balanced scorecard plan.

- 2. Spend additional time mapping out more detailed performance measures and targets on the implementation plan.**

The Branch may wish to engage in additional discussions to further identify performance measures and targets that will help the Branch measure and report on its results. In the implementation and measurement plan, these areas are marked as 'to be identified'. To assist in implementation, additional time should also be spent assigning responsibility to each of the initiatives. The Branch may wish to wait until service agreements, or service deliverables, have been outlined, as this would assist with identifying appropriate performance metrics that should be measured and reported. The Branch is currently scheduled to hold another workshop in August 2010 to complete the implementation and measurement plan. Once the implementation plan is completed, it is recommended that the results be available for staff viewing on the Branch SharePoint site. Staff could be encouraged to reference these documents as they prepare their annual EPDP and set out their key work goals and targets for the year. This will be an opportunity for staff to align their activities to the priorities of the Branch.

3. Develop a plan for revisiting the scorecard on an annual basis, at minimum.

To ensure that the balanced scorecard remains current, the Branch should consider developing a plan for revisiting the scorecard on an annual basis, at minimum. Objective setting focus groups should be held on an annual basis so that participants can review and modify the Branch's performance objectives as priorities shift. The months of April and May would be a good time to conduct an annual review as government annual service plans are published in the month March. Any changes reflected in the Ministry service plan could be considered when reviewing the business unit scorecard. The employee performance and development plan cycle runs from June 1st to May 31st. Completing the annual review during April and May would also mean that the updated scorecard would be available to staff to refer to (and align to) when they start the planning phase of their performance and development plans. Future workshops may wish to consider beginning with an assessment of the Branch's current environment, using the Strengths, Weakness, Opportunities and Threat analysis. This may help capture the key changes that have occurred for the Branch since the previous year.

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APPENDICES

Appendix A: Information Access Operations Business Unit Balanced Scorecard Plan

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Introduction to the Information Access Operations Branch's Business Unit Balanced Scorecard

The Information Access Operations (IAO) Branch (the Branch) business unit balanced scorecard plan was developed using the balanced scorecard approach to translate the vision, mission, and goals of Shared Services BC into a set of prioritized objectives to improve our performance.

A balanced scorecard is a framework for tracking organizational performance and executing strategy. It was used for IAO as a method of: 1) aligning our business activities to the vision, mission, and goals of Shared Services BC, 2) improving our internal and external communications, and 3) monitoring our performance.

As a strategic management tool, our business unit scorecard has helped the Branch identify its priorities for improvement by setting performance objectives, and outlining more specific initiatives, measure, and targets to achieve these objectives. The scorecard will also help us communicate our long-term strategies for growth and the progress we make, both internally to staff and externally to our client.

As a performance management tool, our business unit scorecard will help IAO demonstrate its accountability to its clients by setting performance measures, measuring our success, and reporting on our results. Employees and teams within IAO can also use our scorecard to develop a clear line of sight between their work and the broader objectives of the Branch and goals of Shared Services BC.

For the IAO business unit balanced scorecard, performance objectives were identified for IAO using the following four perspectives: the customer perspective, the internal processes perspective, the financial perspective, and the employee learning and growth perspective. Using these different perspectives, the Branch was able to create a “balanced” approach for executing our strategy.

The Work of the Information Access Operations Branch

The Information Access Operations Branch was created in February 2009, within Shared Services BC, to assist its ministry clients and other public bodies in meeting their obligations under the *Freedom of Information and Protection of Privacy Act* (FOIPPA), the *Document Disposal Act*, and other legislation. The Branch provides two main services to its clients; freedom of information (FOI) services and records management services. IAO provides FOI request processing services to its clients, as well as FOIPPA advisory and training services. The Branch also provides records management training, tools and services, contracted records storage for all of government, as well as input and support for government's management of records within its control and/or custody.

The purpose of centralizing FOI and records management services was to facilitate more efficient processes by standardizing government-wide practices and streamlining business processes. One of the priorities for IAO is to improve response times to provincial information access requests from the public. Performance targets have been set and the Branch is working to standardize and streamline practices and business process in order to achieve these performance targets.

How We Operate: the Vision, Mission, Values and Goals of Shared Services BC

Shared Services BC uses a shared services approach which focuses on continuously improving service delivery and reducing costs to its clients.

Vision statements are a future-oriented word picture of what an organization ultimately intends to become. Shared Services BC's vision is to be excelling in the provision of innovative, responsive, cost-effective and integrated services to the public sector.

Shared Services BC's mission statement defines the purpose of our organization and why it exists. Our mission statement is to provide shared support services for public sector organizations to better serve the people and businesses of British Columbia.

Goals are used to guide the design and operation of Shared Services BC. The three goals of Shared Services BC are to: maintain a high level of client satisfaction, be accountable to our clients, and reduce our unit and overall shared services costs.

To create alignment, the Information Access Operations Branch identified performance objectives to help it achieve the three goals of Shared Services BC.

What our Clients Expect from Us

To assist our clients in meeting their obligations under the *Freedom of Information and Protection of Privacy Act* (FOIPPA), the *Document Disposal Act*, and other legislation, the Information Access Operations Branch is expected to provide high quality records management and freedom of information request services. As a Branch committed to providing high quality services to our clients, we began by identifying what our clients expect from us as an organization.

Our clients expect the following records management services:

- ❖ Clear, reliable and timely advice
- ❖ Staff training to ensure that they are in compliance with policy and legislation requirements & systems training
- ❖ Secure and cost-efficient storage, retrieval & destruction of records
- ❖ Develop effective and efficient tools to manage electronic and paper information
- ❖ Leadership for best practices (guidelines & policies)
- ❖ Good communication
- ❖ Quality Assurance role e.g. records management reviews
- ❖ Records management clean-up projects
- ❖ Develop Operational Records Classification Systems (ORCS)
- ❖ Innovative solutions to records management challenges

Our clients expect the following FOI services:

- ❖ Provide timely responses to FOI requests
- ❖ Provide expertise, sound advice
- ❖ Facilitate compliance with FOIPPA
- ❖ Ensure quality service
- ❖ Corporate knowledge of ministry mandates and programs
- ❖ Timely and accurate reporting and measuring
- ❖ Innovative responses to managing access requests
- ❖ Clear two way communication, receive updates
- ❖ Safeguard and protect sensitive information
- ❖ Trusted advisor to Ministries and the public
- ❖ Staff will be available and accessible
- ❖ Provide training
- ❖ Provide cost-effective service

The Information Access Operations Branch's Performance Objectives

The following nine performance objectives were identified by senior staff members in the Information Access Operations Branch, using the four balanced scorecard perspectives:

Objectives from the Customer Perspective

10. **Create & maintain positive partnerships & relationships with our clients** - the work of IAO involves working collaboratively with our clients to assist them in meeting their statutory obligations. To do this, it is critical that IAO create and maintain partnerships and relationships with our clients.
11. **Meet statutory obligations** – IAO is responsible for assisting our clients so that they can meet their statutory obligations under the *Freedom of Information and Protection of Privacy Act* and the *Document Disposal Act* and other legislation. To achieve this objective, IAO must ensure that it has the internal skills and processes in place to meet its service standards.

Objectives from the Internal Processes Perspective

12. **Develop a communication plan** – two-way communication with our clients is critical for maintaining client satisfaction. To achieve this objective, IAO must effectively communicate to its clients, the importance of meeting their statutory obligations under the *Freedom of Information and Protection of Privacy Act* and the *Document Disposal Act* and other legislation.
13. **Rationalize & simplify processes to meet client needs and create efficiencies** – providing high quality and cost-effective services are important to our clients. To achieve this objective, we must simplify our processes and create efficiencies.
14. **Ensure quality assurance & regularly report our results** – as a shared services organization, we must monitor the quality of our work and be accountable to our clients by reporting on our results. IAO will achieve this objective by developing plans for quality assurance and performance reporting.

Objectives from the Financial Perspective

15. **Reduce costs by being efficient and creating value** – as a shared services organization, creating better value for our customers involves looking for ways to reduce the cost of our services. To achieve this objective, we must utilize our human resources and technology tools as effectively as possible.
16. **Define core services & create service agreements** – to be accountable to our clients, our Branch must define our core services and create service agreements with our clients. Achieving this objective is crucial for defining performance metrics to measure and report on our results.

Objectives from the Employee Learning & Growth Perspective

17. **Create a learning organization to improve staff competencies & develop needed workforce skills** – our Branch needs to be an organization that is committed to continually learning and developing our skills. To achieve this

objective, it is the responsibility of everyone in the Branch to take ownership of their learning needs, in line with the learning needs of the Branch.

18. **Rationalize job descriptions & classifications & determine what skills are needed for each position** – as a new organization, it is important that our job descriptions and classifications are rationalized, and that we determine what skills are needed for each position. We will achieve this objective by reviewing job classifications where discrepancies exist, reviewing our job descriptions and job profiles, and identifying what skills are needed for each position.

IAO Strategy Map of Objectives

IAO's strategy map is part of the balanced scorecard framework. It is a visual representation of the performance objectives for the Branch, and their relationship to the four perspectives of the balanced scorecard, and the goals and mission of Shared Services BC.

The objectives in the strategy map are linked together in a cause-and-effect chain. By improving performance in the objectives in the employee learning and growth perspective (the bottom row), the Branch will enable improvements in the financial perspective objectives (the next row up). The objectives in the financial perspective in turn enable the Branch to improve its performance in the internal processes perspective (the next row up). Improvements in the Branch's internal processes perspective enable improvements in the objectives in the customer perspective (top row). The performance objectives in the customer perspective (the top row) support the achievement of the mission statement and three goals of Shared Services BC.

Information Access Operations Branch Strategy Map

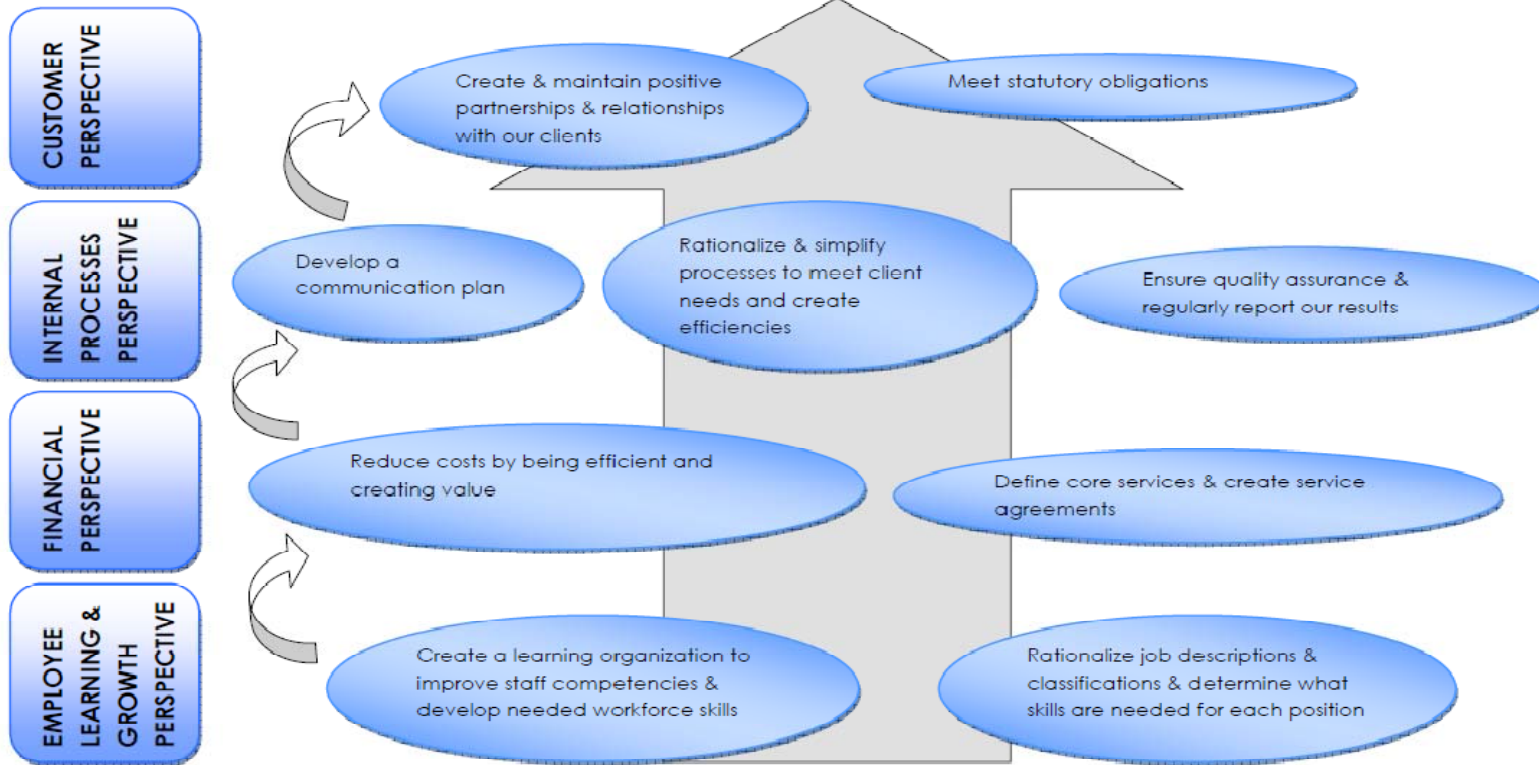
SSBC

Mission Statement

To provide shared support services for public sector organizations to better serve the people & businesses of BC

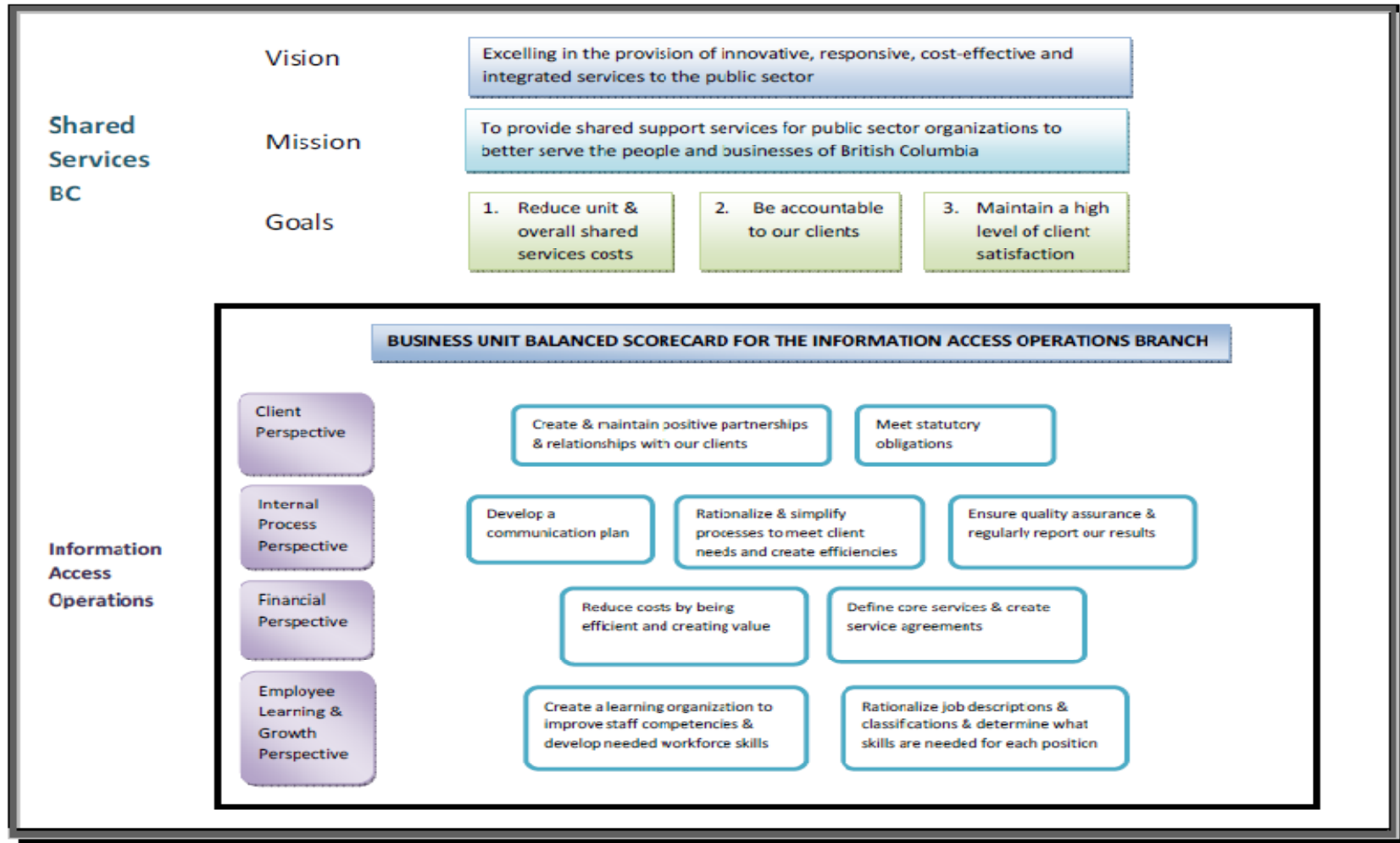
Goals

1. Reduce unit and overall shared services costs
2. Be accountable to our clients
3. Maintain a high level of client satisfaction



IAO Balanced Scorecard

The business unit balanced scorecard outlines the performance objectives for the Information Access Operations Branch, and illustrates their relationship with the four balanced scorecard perspectives, as well as their alignment to the vision, mission and goals of Shared Services BC.



Monitoring and Measuring

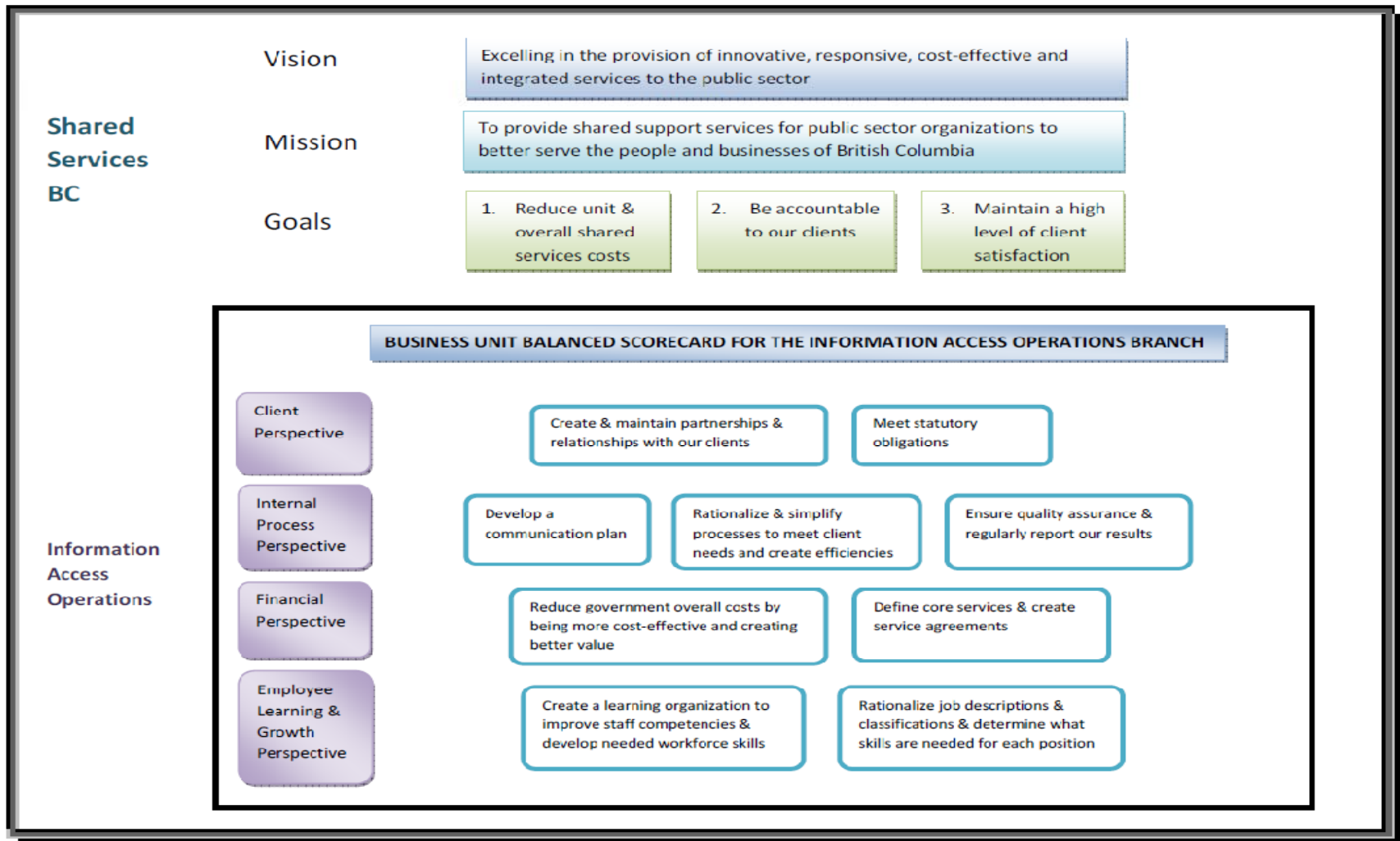
Monitoring and measuring our performance is an important part of our business unit scorecard, particularly now that we are a shared services organization. By developing performance measures, targets and timelines, we are creating a plan for implementing and measuring our progress. The following tables identify IAO’s nine performance objectives, and their associated performance measures, initiatives, targets, and timelines. The below table incorporates the performance objectives, measures, initiatives, targets and timelines for both records management and FOI into a single implementation and measurement plan for the Branch.

BALANCED SCORECARD PERSPECTIVE	OBJECTIVE	MEASURE	INITIATIVE	TARGET	TIMELINE
Customer	1. Create and maintain positive partnerships and relationships with our clients	To be identified	<ul style="list-style-type: none"> ➤ Create means of obtaining client feedback (e.g. surveys, client evaluation forms) ➤ Determine means of communicating with clients (at all levels) ➤ Obtain and incorporate client feedback and input ➤ Establish links with Directors of Client Relations 	To be identified	1 year
	2. Meet statutory obligations	To be identified	<ul style="list-style-type: none"> ➤ Recruiting and training ➤ Create awareness, increase knowledge ➤ Identify client ambassadors ➤ Ensure quality assurance ➤ Improve client relationships 	To be identified	To be identified
Internal Processes	3. Ensuring quality assurance and reporting results on a regular basis	To be identified	<ul style="list-style-type: none"> ➤ Define performance measures ➤ Develop baseline, conduct gap analysis, analysis of tools ➤ Assess technological gaps and areas in need of improvement ➤ Utilize project management tools and resources ➤ Clarify priorities ➤ Ensure sufficient resources ➤ Develop a performance management system 	To be identified	1 year

BALANCED SCORECARD PERSPECTIVE	OBJECTIVE	MEASURE	INITIATIVE	TARGET	TIMELINE
	4. Develop a communication plan	<ul style="list-style-type: none"> - Client satisfaction measures on client survey - Positive feedback 	<ul style="list-style-type: none"> ➤ Develop a communication plan ➤ Develop a client feedback survey ➤ Finalize website ➤ Identify client contacts in ministries and agencies ➤ Communicate roles and responsibilities 	To be identified	
	5. Rationalize and simplify our processes to meet our client's needs and to be more efficient within the Branch	To be identified	<ul style="list-style-type: none"> ➤ Re-evaluate processes ➤ Develop policy approval processes (who signs what) ➤ Simplify and rationalize current internal processes (less accession numbers on system) ➤ Revise ORCS within IAO ➤ Develop training plan and training schedule ➤ Review application processes 	To be identified	1 year
Financial	6. Define core services and create service agreements	Staff and client understanding of roles and responsibilities	<ul style="list-style-type: none"> ➤ Define core services ➤ Develop service level agreements 	To be identified	6 months
	7. Reduce costs by being efficient and creating value	To be identified	<ul style="list-style-type: none"> ➤ Implement EDRMS ➤ ORCS development ➤ Develop in house expertise ➤ Expand RCS client base and services ➤ Complete backlog approvals 	To be identified	Target for EDRMS, ORCS development & complete backlog approvals is to meet annual development plan

BALANCED SCORECARD PERSPECTIVE	OBJECTIVE	MEASURE	INITIATIVE	TARGET	TIMELINE
Employee Learning & Growth	8. Create a learning organization to improve staff competencies and develop needed workforce skills	Results of Work Environment Survey (WES)	<ul style="list-style-type: none"> ➤ Create cross-training opportunities ➤ Change attitudes and motivate staff ➤ Create internal “foreign exchange program” between teams ➤ Improve employee engagement ➤ Create skills database ➤ Manage HR risks ➤ Management team to develop epdp goal to support this objective ➤ Outline career paths ➤ Develop succession planning (e.g. plan for future retirements) to maintain corporate knowledge ➤ Skills gap analysis ➤ Identify training opportunities ➤ Job rotation ➤ Cross training ➤ Co-op training ➤ Mentorship ➤ Recruit ➤ Develop training plan 	To be identified	1-2 years & ongoing
	9. Rationalize job descriptions & classifications and determine what skills are needed for each position	To be identified	➤ Review job descriptions and classification	To be identified	1 year

Appendix B: Information Access Operations Branch Business Unit Balanced Scorecard



Appendix C: Invitation to Participate – Focus Group

Hi All,

The Information Access Operations Branch is in the process of developing a business unit balanced scorecard. As part of this project I am undertaking the work of developing this balanced scorecard and preparing a set of recommendations for the scorecard implementation.

I would like this opportunity to request your participation to take part in a focus group session to gather input for the successful implementation of this business unit scorecard. I am attaching a copy of the workbook that I will use during the focus group session, which may assist you in preparing for the session.

A Participant Consent Form (also attached) will be provided to all participants. This form indicates that your participation is voluntary and includes a clear explanation of how the focus group information will be used in the project. I will ask the participants to sign the consent form at the time of the focus group session.

I will be happy to answer any questions you may have about the project or about these documents. Please let me know if you would like to participate in the focus group by 'accepting' this meeting invite. I look forward to hearing from you.

Many thanks

Andrea Bingham

Appendix D: Consent Form – Focus Group

Consent Form – Focus Group

You are being invited to participate in the development of a business unit balanced scorecard for the Information Access Operations Branch, conducted by Andrea Bingham, Team Lead of the Information Access Operations Branch. As a graduate student, I am required to conduct a research project as part of the requirements for a Master's Degree in Public Administration. This research project is being conducted under the supervision of Bart Cunningham, Professor at the University of Victoria. You may contact Andrea Bingham if you have any questions by telephone at 250-387-7673 or by email at andrea.bingham@gov.bc.ca.

The purpose of this project is to create a business unit scorecard, for the newly created Information Access Operations Branch, to strategically align it with Shared Services BC, Ministry of Citizens' Services. The goal is to use the Balanced Scorecard as a framework for defining the objectives of the Branch within four perspectives (i.e. Customer, Financial, Internal Business Process, and Learning and Growth). This project will also examine barriers to implementing the balanced scorecard objectives.

I hope that a project of this type is important because it will enable the Information Access Operations Branch to plan its progress toward achieving its objectives. It will also provide the Branch with tools to assess its performance, and collect performance information that will enable the Branch to adjust its strategies, activities and/or objectives to improve its efficiency and effectiveness using the four perspectives of the Balanced Scorecard (i.e. Customer, Financial, Internal-Business Process, and Learning and Growth).

You are being asked to participate in this study because you are a senior staff member in the Information Access Operations Branch, and therefore, your input is extremely valuable to the development of a balanced scorecard for the Branch.

If you agree to participate in this research, your participation will include a one time, in person, focus group session. The focus group will be approximately 2 – 2 ½ hours long and will be held at a boardroom that is in close proximity to your work location. The only two potential inconvenience associated with participating in this study will be the time commitment for the focus group session, and the potential travel requirement required to get to the meeting room location. There are no known or anticipated risks to you by participating in this research.

The potential benefit of your participation in this research is to increase your familiarity with the Information Access Operations Branch's goals and objectives, and to have a voice in shaping and contributing to the successful implementation of the Information Access Operations Branch's Balanced Scorecard.

Your participation in this research must be completely voluntary. If you do decide to participate, you may withdraw at any time without any consequences or any explanation. If

you do withdraw from the study any information that you have already provided for this study will not be used in the analysis and will be destroyed.

Because the focus group session will take place in person, in a group setting, your anonymity cannot be protected from the researcher. Only your name will be recorded on the focus group record and all information will be summarized and presented in aggregate so as not to associate your identity with the information presented. Your confidentiality and the confidentiality of the data will be protected. No personal identifiers will be attributed to the information collected at the focus group session.

It is anticipated that the results of this study will be shared with the Information Access Operations Branch executive, management, staff members, and the final report will be available to other students or faculty of the School of Public Administration at the University of Victoria.

In addition to being able to contact the researcher and the supervisor at the above phone numbers, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Associate Vice-President, Research at the University of Victoria (250-472-4362).

Your signature below indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researchers.

Name of Participant

Signature

Date

A copy of this consent will be left with you, and a copy will be taken by the researcher.

Appendix E: List of Performance Objectives Identified by the Two Focus Groups

The following tables list the performance objectives that were identified by the focus group participants before there were narrowed and prioritized. From these lists, the groups reviewed and screened the objectives to identify their top five performance objectives, preferable with at least one performance objective in each of the four balanced scorecard perspectives. The prioritized objectives are shown in the “Findings” section of this report.

Table 7: Records Management Performance Objectives

BALANCED SCORECARD PERSPECTIVE	OBJECTIVES
CUSTOMER	1. Implement Enterprise Document and Records Management System (EDRMS)
	2. Communicate benefits of tools to our clients
	3. Communicate hidden costs of poor records management
	4. Provide timely services and information
	5. Provide training to clients to help them manage their records
	6. Monitor and communicate the results of our records management performance to our clients (once IAO/client ministry roles and responsibilities are defined in a service agreement)
	7. Provide information to our clients about our services and develop complaint (feedback) processes
	8. Develop service agreements
	9. Develop a communication plan
INTERNAL PROCESSES	10. Rationalize and simplify our processes to meet our client’s needs and to be more efficient within the Branch.
	11. Re-evaluate processes
	12. Restructure and realign business processes
	13. Determine what consistent processes are non-negotiable and be able to clearly communicate that to our customers.
	14. Revise legislation to better manage electronic records and make the records scheduling and disposition process more efficient
	15. Improve efficiency in responding to clients

BALANCED SCORECARD PERSPECTIVE	OBJECTIVES
FINANCIAL	16. Streamline application processes for off-siting and disposing of records
	17. Save money for our customers
	18. Reduce government overall costs – better value and cost-effective
	19. Invest in the future (long-term) and communicate these benefits to our clients
	20. Solve the Archive transfer fees issue
	21. Communicate risks to clients of reducing records management resources (staff funding)
	22. Provide advice and input to clients to support the development of a strong records management infrastructure
	23. Quantify the cost of poor records management and communicate this to clients
EMPLOYEE LEARNING & GROWTH	24. Rationalize job descriptions & classifications and what skills are needed for each position
	25. Re-design processes
	26. Provide opportunities to staff to develop skills in business analysis, contract management, communication, and project management
	27. Acquire communication specialist position
	28. Develop communication processes
	29. Enhance ORCS development skills
	30. Enhance work development opportunities
	31. Recruit knowledgeable staff through co-op program and mentoring programs
	32. Career paths in records management need to be viewed differently by others – offer more opportunities, different kinds of training
	33. Improve support for employee training in innovative & emerging technology training through involvement in cross-jurisdictional and professional committees, conventions, conferences, and symposiums
	34. Develop needed workforce skills and competencies

Table 8: FOI Performance Objectives

BALANCED SCORECARD PERSPECTIVE	OBJECTIVES
CUSTOMER	<ol style="list-style-type: none"> 1. Meet statutory obligations 2. Create awareness – provide clarification, information, peace of mind, user friendly tools and support 3. Creating and maintaining partnerships and relationships with our clients 4. Technology and safeguard information 5. Knowledgeable staff with analytical skills 6. Confident in service providing ability to get the job done 7. Superior communication and engagement, with the ability to ask questions and extract information
INTERNAL PROCESSES	<ol style="list-style-type: none"> 1. Continuous improvement, streamlining services, avoid duplication 2. Reporting results on a regular basis 3. Quality assurance 4. Communication 5. Proactively provide solutions to problems and issues 6. Utilize knowledgeable staff 7. Be creative and innovative 8. Engage new methods of training (e.g. role playing, mediation, negotiation skills)
FINANCIAL	<ol style="list-style-type: none"> 1. Utilize human resources 2. Appropriate classification and compensation for work and service that is provided 3. Utilize available technology 4. Manage resources effectively 5. Define core services and create service agreements 6. Consistently apply fee estimates, if warranted (volume, program area time required)
EMPLOYEE LEARNING & GROWTH	<ol style="list-style-type: none"> 1. Define competencies

BALANCED SCORECARD PERSPECTIVE	OBJECTIVES
	2. Improve staff competencies
	3. Recruit staff with desired competencies
	4. Develop policies to support learning growth objectives
	5. Conduct gap analysis
	6. Identify training needs
	7. Develop mentoring program
	8. Opportunities for professional development
	9. Engage staff to capitalize on their knowledge and build enthusiasm
	10. Create a learning organization to improve staff competencies

Setting Performance Objectives for the Information Access Operations Branch: Focus Group Session Workbook

Workbook Purpose:

This workbook was created to assist the focus group participants as they work through the process of identifying performance objectives for the Information Access Operations Branch.

Focus Group Session Goals:

- To define performance objectives for the Information Access Operations Branch, that will align it with Shared Services BC.
- To identify performance measures, targets, timelines and initiatives for each objective that is identified.

Steps for Achieving these Goals

1. Review purpose of study and confidentiality information
2. Explain the Balanced Scorecard Approach
3. Review vision, mission, and goals of Shared Services BC
4. Define objectives for the Information Access Operations Branch
5. Identify performance measures, targets, timelines and initiatives for each of the objectives

Step 1: Review purpose of study and confidentiality

Purpose of Study

Over the past year, the Information Access Operations Branch has formed within Shared Services BC. For employees within the Branch, this has meant significant organizational restructuring. This has also meant a distinctly new approach to the delivery of FOI requests, records management, and privacy services into a shared services model of service delivery. The process of bringing together employees who previously operated independently in small teams throughout different ministries, into a shared services model has created a need to strategically align the branch, and its employees, within Shared Services BC.

Shared Services BC has defined its vision, mission, and goals, which provide us with the big picture guidelines of where we're heading as a Division (see attachment 1: Shared Services BC How We Operate). What it doesn't tell us is what specifically the IAO Branch will do to support the achievement of the Division's vision, mission and goals. The purposes of this study is to help us answer the following question: What will the Information Access Operations Branch do to excel in the provision of innovative, responsive, cost-effective and integrated services (FOI, records management and privacy) to the public sector? By determining this, we will be able to translate (or link), the strategic priorities of Shared Services BC down to the Information Access Operations Branch. The first step, and the purpose of these focus groups, is to identify performance objectives for the IAO Branch. Once you have identified objectives, you will then further translate them into more specific performance measures, targets, timelines and initiatives. This will help us identify what needs to be done, how we should go about doing it, when it should be completed by, who will be responsible for doing it. This final step is essential for ensuring that the Branch develops a plan for achieving the performance objectives that are set out.

Confidentiality

- Participant to read the consent form, ask the researcher questions, and then sign both copies of the consent form.

Step 2: Explain the Balanced Scorecard Approach

What is a balanced scorecard? A framework for tracking organizational performance and executing strategy. It is used extensively by government organizations, private-sector businesses and nonprofit organizations as a method of: 1) aligning business activities to the vision and strategy of the organization, 2) improving internal and external communications, and 3) monitoring organization performance against strategic goals. On a balanced scorecard, performance objectives (or desired outcomes) are identified for the organization, using four different perspectives: Customer, Financial, Internal Process, and Employee Learning and Growth. The 'balance' is achieved by ensuring that organizations focus not only on their clients and budgetary issues, but also on their internal processes and the capacity and development of their employees.

Origins of the balanced scorecard: The balanced scorecard was developed by Robert Kaplan and David Norton of Harvard University in about 1990 when they were developing a new method of performance measurement system for companies. This new method focused around the belief that relying only on financial measures of performance was affecting companies' ability to create value. Kaplan and Norton developed a more "balanced" perspective for performance measurement, which included not only the financial perspective, but also measures of success in the areas of customers, internal processes, and employee learning and growth.

Benefits of the balanced scorecard approach for IAO:

- Improved organization alignment (e.g. align employee epdp goals and team goals to the goals of the Branch)
- Improved communications within the Branch regarding its strategy and organizational results
- Improved accountability to our client Ministries through greater emphasis on strategic planning and measuring organizational results

For this study, the balanced scorecard approach will be used to translate Shared Service's BC's vision, mission, and goals into a set of focused objectives and key initiatives for the Information Access Operations Branch's performance. Our goals today are to identify objectives and initiatives for the Branch, using the four perspectives of the balanced scorecard.

Step 3: Review vision, mission, goals, and values of Shared Services BC

The purpose of reviewing the vision, mission, and goals of Shared Services BC is to improve our understanding of the strategic planning information that has already been established for the division. See attachment 1 (Shared Services BC "How We Operate") as we go through this section.

Task 3.1: Review the vision

What is a vision? *A powerful vision provides everyone in the organization with a shared mental framework that helps give form to the often abstract future that lies ahead. Effective visions provide a word picture of what the organization intends ultimately to become – which may be 5, 10, or 15 years in the future.*

The vision of Shared Services BC: *Excelling in the provision of innovative, responsive, cost-effective and integrated services to the public sector.*

Task 3.2: Review the mission

What is a mission? *Defines the core purpose of the organization – why it exists. Effective missions are inspiring, long-term in nature, and easily understood and communicated.*

The mission of Shared Services BC: *To provide shared support services for public sector organizations to better serve the people and businesses of British Columbia.*

Task 3.3: Review Goals

What is a goal? A goal is a desired end state.

The Goals of Shared Services BC are:

4. Maintain a high level of client satisfaction

What this means:

- Client satisfaction will be a key measure of our success;
- Processes will be designed to meet the needs of the clients while maintaining cost-effectiveness
- Governance and service delivery functions will be separated
- We will create a high performing, learning organization

5. Be accountable to our clients

What this means:

- Pricing of services will be competitive, clear and simple. Performance will be measured and reported;
- Clients will have recourse for non-competitive or poor service.

6. Reduce unit and overall shared services costs

What this means:

- Services and delivery processes will be designed to be cost-competitive with similar service delivery organizations in the private and public sectors;
- There will be no duplication of services

More information about what these three goals mean can be found in attachment 2 (Shared Services BC “Operating Principles”)

Step 4: Define objectives for the Information Access Operations Branch

Task 4.1: Understanding Objectives

What is an “Objective”? A concise statement describing the specific things organizations must do well in order to execute its strategy. Objectives often begin with action verbs such as “increase”, “reduce”, “improve”, “achieve”, and the like.

Why do we need objectives? Objectives will help us translate the three broad goals of Shared Services BC into directional and action oriented statements of what the Information Access Operations Branch must do well in order to implement our strategy. Objectives will be identified for each of the four balanced scorecard perspectives and will likely be linked together in a cause-and-effect logic.

Criteria for Objectives: SMART

S = Specific behaviors required to achieve objectives

M = Measurable

A = Actionable

R = Realistic, but challenging

T = Time bound

Examples of objectives: “Reduce branch operating costs” (Financial), “Improve response time for processing FOI requests” (Customer), “Create process efficiencies for handling FOI requests using economies of scale” (Internal), “Achieve positive employee climate” (Learning & Growth).

The objective should be written clearly enough that a regular person can understand what it means.

Sample Objective:

Objective: Improve FOI request response times

Objective Statement:

Improve response times to provincial information access requests from the public

Initiatives

- ❖ Actively manage to statutory timelines for information access requests with Ministry customers.
- ❖ Create more efficient request processing by standardizing government-wide practices and streamlining business processes

Measures

1. Percentage of FOI requests processed within legislated timelines
2. Average number of days to process FOI requests

What is the difference between a goal and an objective? Think of goals as the treasure at the top of the stairway, and the objectives as the stairs. In other words, one of the goals of Shared Services BC is to maintain a high level of client satisfaction. Objectives are the things that we will do to achieve this goal (e.g. meeting our service delivery timeline standards).

Task 4.2: Identify Objectives

Now, we will move on to identify objectives that the IAO branch can set that will help it achieve the three goal set out for Shared Services BC.

Goal 1: Maintain a high level of client satisfaction

What this means:

- Client satisfaction will be a key measure of our success;
 - Processes will be designed to meet the needs of the clients while maintaining cost-effectiveness
 - Governance and service delivery functions will be separated
 - We will create a high performing, learning organization
- The Information Access Operations Branch has two main clients: citizens and ministry clients. This differs slightly between the teams within the Branch. For example, Privacy and Records Management primarily have only one client (their client ministries), while FOI teams have an additional client (citizens who make FOI requests).

Question 1 (client perspective): Who are our clients, and what must we do well to satisfy them? What do our clients expect or demand from you as an organization?

Definition: A *customer* is defined as a person or group that directly benefits from our products or services.

(Our two main clients are citizens and ministry clients)

Start by identifying what our clients expect or demand from you as an organization.

MINISTRY CLIENT EXPECTATIONS

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

CITIZEN EXPECTATIONS (if applicable)

- 1.
- 2.
- 3.
- 4.
- 5.

6.

- Although the lists of expectations may be lengthy, go back to determine whether it is a legitimate customer expectation that fits with your ongoing strategy (i.e. the vision, mission, and goals of Shared Services BC)
- To identify objectives, review the lists and identify *what must we do well in* to satisfy our clients (i.e. citizen and ministry clients).
- Think about this in terms of “if-then” statements. For example, *if* we are to deliver timely services to our clients, *then* we must...

Objective:

Objective:

Objective:

Question 2 (internal processes perspective): At which processes must we excel if we are to meet client needs? How are we going to accomplish the objectives that we have set out for our two clients? (think about realistic objectives that are achievable and are not going to “break the bank”)

Objective:

Objective:

Objective:

Question 3 (financial perspective): Financially, what is most critical to us: enhancing productivity, utilizing our assets more efficiently?

Objective:

Question 4 (employee learning and growth):

- What skills and competencies do we require to succeed and execute our strategy?
- Do our employees have the technology tools they require to meet customer requirements and execute our strategy?
- Do we have the proper organizational climate (culture, alignment, teamwork) necessary for success?
- What measures do we currently use to gauge our success?

(think about realistic objectives that are achievable and are not going to break the bank)

Objective:

Objective:

Goal 2: Be accountable to our clients

What this means:

- Pricing of services will be competitive, clear and simple. Performance will be measured and reported;
- Clients will have recourse for non-competitive or poor service.

Question 1: (client perspective) To be accountable to our clients (ministry clients and public), what must we do well in?

Objective:

Objective:

Question 2 (internal processes perspective): At which processes must we excel if we are to be accountable to our client? How are we going to accomplish the objectives that we have set out for our clients? (think about realistic objectives that are achievable and are not going to break the bank)

Objective:

Objective:

Question 3 (financial perspective): Financially, what is most critical to us: enhancing productivity, utilizing our assets more efficiently?

Objective:

Question 4 (employee learning and growth):

- What skills and competencies do we require to succeed and execute our strategy?
- Do our employees have the technology tools they require to meet customer requirements and execute our strategy?
- Do we have the proper organizational climate (culture, alignment, teamwork) necessary for success?
- What measures do we currently use to gauge our success?

Objective:

Objective:

Goal 3: Reduce unit and overall shared services costs

What this means:

- Services and delivery processes will be designed to be cost-competitive with similar service delivery organizations in the private and public sectors;
- There will be no duplication of services

Question 1 (client perspective): What do our clients expect or demand from you as an organization in terms of reducing the cost of our shared services (FOI, records, privacy)?

Objective:

Question 2: (internal processes perspective): At which processes must we excel if we are to reduce our unit and overall shared services costs? How are we going to accomplish the above objectives? (think about realistic objectives that are achievable and are not going to break the bank)

Objective:

Question 3 (financial perspective): How will we reduce our costs to our clients, given our resources?

Objective:

Question 4 (employee learning and growth):

- What skills and competencies do we require to succeed in reducing costs to our clients?
- Do our employees have the technology tools they require to reduce costs?
- Do we have the proper organizational climate (culture, alignment, teamwork) necessary for success in cost-reduction?
- What measures do we currently use to gauge our service cost reduction?

Objective:

Task 4.3 Screen the Number of Objectives to a Manageable Number (maximum 5)

Before we move on to Step 5 (identifying performance measures, targets, timelines, and initiatives for each of the objectives), let's review the objectives that have been identified so far and try to screen them to a manageable number. Remember that we are looking to identify 8-10 performance objectives for the entire Branch, and this is only one of the three work units that is involved in identifying these performance objectives.

Let's try to narrow down our findings to a maximum of 5 performance objectives. In this exercise, less is more; each of the performance objectives that we identify will spawn multiple performance measures and initiatives.

How do we do this?

- Review the objectives that were identified and look for areas of duplication that can be amalgamated
- Eliminate performance objectives that are not linked to the broader strategy of SSBC (i.e. the three goals of Shared Services BC)
- Eliminate objectives that are likely not feasibility (financially, technologically).

Step 5: Identify performance measures, targets, timelines and initiatives for each of the objectives

Task 5.1 Identifying Performance Measures

Now, review the objectives that you identified above and think of how we could measure the performance of these objectives. What would be effective and meaningful measures of these objectives? The performance measure should tell us when we have achieved the objective. Think about the types of outcomes that you would hope to achieve with the objectives that you identified.

List the performance measures next to the above objectives.

Other question to prompt thoughts on identifying performance measures:

- If you were to succeed on the objective, what do you physically see people doing; what behaviors are they engaged in? What are they saying, how are they acting?
- You can also ask yourself what behavioural change the objective demands; what improvements are required.
- Does it entail doing something faster, more accurately, with more customer involvement, with greater knowledge inputs?

Task 5.2 Identifying Targets & Timelines

Identify performance targets for each of the objectives. Set performance targets that are realistic, yet challenging.

Assign an approximate time frame for achieving these targets (e.g. 6 months, 5 years).

Task 5.3 Identifying Initiatives

Initiatives help us translate our targets into reality by identifying specific programs, activities, projects, or actions that you will engage in to help ensure that you meet or exceed your performance targets.

Try to think of initiatives (i.e. programs, activities, projects, actions) that we could engage in that would support the objectives that you identified. Initiatives can include existing initiatives that we are currently doing, as well as new initiatives.

Closing Comments

- Summarize findings (i.e. the objectives, performance measures, targets, timelines and initiatives that were identified)
- Identify next steps – researcher to complete focus group sessions, analyze findings, and then prepare strategy map and balanced scorecard & share with participants

Attachments:

1. Shared Services BC “How We Operate”
2. Shared Services BC “Operating Principles”
3. Shared Services BC “Shared Services Approach”

Attachment 1: Shared Services BC “How We Operate”



How We Operate

Vision

Excelling in the provision of innovative, responsive, cost-effective and integrated services to the public sector

Mission

To provide shared support services for public sector organizations to better serve the people and businesses of British Columbia

Goals

Reduce unit and overall shared services costs
Be accountable to our clients
Maintain a high level of client satisfaction

Values

Integrity: to conduct ourselves in an ethical, honest, consistent and professional manner
Responsibility: to delivery the highest possible standard of affordable and reliable customer centered service
Accountability: to measure, monitor and report on performance in an open and transparent manner
Respect: to work with our staff, customers and others in a collective way and treat them with courtesy, fairness, dignity and trust
Choice: to strive to be the provider of choice to our customers

Attachment 2: Shared Services BC “Operating Principles”



Operating Principles

The Shared Services BC team has developed a set of Principles to guide the design and operation of the organization. These Principles are based on approved strategy, input of the client base and best practices.

We Must:	The following Principles provide the standard to guide our efforts in meeting needs and achieving success:
Focus on maintaining a high level of client satisfaction	<p>Client satisfaction will be a key measure of our success</p> <p>Client satisfaction will be measured through an independent source with results being shared with governance agencies and clients on a regular basis Effective processes for client service concerns will be in place Client feedback will be solicited regularly Structured evaluations will be focused on client satisfaction reflecting practices, levels of service and cost management</p> <p>Processes will be designed to meet the needs of the clients while maintaining cost-effectiveness</p> <p>Processes will be flexible Channels of choice will be available and clearly defined Pricing will be tiered to service levels</p> <p>Governance and service delivery functions will be separated</p> <p>Client organizations will be responsible for the legality, policy-compliance and appropriateness of service requests</p> <p>We will create a high performing, learning organization</p> <p>Teamwork and communication will be encouraged Client focused service ethic will be rewarded Best talent will be recruited, developed and retained Continuous improvement will be emphasized</p>
Reduce Costs	<p>Services and Delivery processes will be designed to be cost-competitive with similar service delivery organizations in the private and public sectors</p> <p>Services will be structured such that they can stand alone in order to enable sound decisions around potential outsourcing Underlying enabling technologies must support stand-alone design and cost-effectiveness</p> <p>There will be no duplication of services</p> <p>Services designated as 'shared' will only be available through the Shared Services BC organization Regular evaluation of processes and costs will be conducted to identify duplication, overlaps or inefficiencies</p>

	Investment will be made in knowledge, technology, best practices and process improvement to improve cost efficiency
Be accountable to the client base	<p>Pricing of services will be competitive, clear and simple Performance will be measured and reported</p> <p>Service levels will be contracted and measured through Service Level Agreements</p> <p>A Measurement and Performance Framework (e.g. Balanced Scorecard) will be instituted including measures around Finance, Customer, Process and Growth and Learning and reported to the Management Board, Governance Agencies and Clients regularly</p> <p>Services and costs will be benchmarked against comparable organizations</p> <p>Clients will have recourse for non-competitive or poor service</p> <p>Following a 36 month start-up period during which services are exclusive, outsourcing decisions by ministries will be based on a business-case analysis approved by the Management Board</p>

Glossary

Principles defined as "A rule or standard" to guide conduct

Shared Services BC refers to the shared services organization within the Ministry of Labour and Citizens' Services and reporting to Deputy Minister, Lori Wanamaker.

Management Board refers to the Shared Services Board of Directors.

Services refer here to the services designated to the Shared Services BC organization and specifically exclude Human Resource Services to be provided by BC Public Service Agency

Clients refers to the ministry that is signatory to a Service Level Agreement

Attachment 3: Shared Services BC “Shared Services Approach”

Shared Services BC

Shared Services BC (SSBC) uses a leading-edge approach to service delivery. We are client focused and client input is used to continuously improve service delivery and reduce costs.

The Shared Services BC approach includes:

- Modifying policies
- Streamlining and standardizing processes
- Using technology to drive out further efficiencies
- Continuous improvement

The result is improved service and reduced costs over time.

Organizations that establish shared service providers do so to optimize the benefits of:

- Lower costs
- Standardization of processes
- Sharing internal and external best practices
- Measured productivity
- Leveraging of common systems
- Appropriate technology
- Customer driven service delivery
- Service orientation

The shared services model creates economies of scale and provides the flexibility to meet individual client needs. Clients experience reduced costs for support services and are better able to focus on their core priorities. In addition, clients have direct input into the service levels they receive and the related costs.

Clients can access a range of services from a single point of contact. Most leading private sector companies across the world currently use some form of shared services in the management of their business.

When you work in a shared services organization you are offering a “best practice” business solution to your clients. A “best practice” approach is more than a good idea. It is a high-performance way of achieving business objectives, which solves problems, creates opportunities, and improves business results.