



Balanced Scorecard: An integrated strategic planning and performance management system that communicates with clarity an organization’s vision, mission, and strategy to employees and other stakeholders; aligns day-to-day work to vision and strategy; provides a framework for prioritizing programs, projects, services, products, and resources; and uses strategic performance measures.

Customer: Direct beneficiary of an organization’s products or services. Often the end user of the organization’s services or products. *For Upstate Medical University, this primarily includes the community, patients, and learners. Additional examples would be referring physicians and donors.*

Intended Result: Desired outcome associated with an objective – a ‘plain English’ description of what successful performance looks like.

Mission: Purpose; What we do. Includes who is served and what products, programs and services are provided to customers and stakeholders. *For Upstate Medical University, ‘To improve the health of the communities we serve through education, biomedical research and health care.’*

Performance Measures and Targets: Captures whether an organization is performing at the desired level or not. Provide objective evidence of progress on achieving a strategic objective.

Perspectives: Different views of organizational performance; A ‘lens’ through which we view performance.

- **Organizational Capabilities: (People, Facilities and Technology):** How we support internal processes through improved tools, technology; knowledge, skills and abilities; Infrastructure; Work culture, innovation, and leadership; Governance. (Example: Improve Culture of Trust)
- **Internal Processes:** Focuses on processes that create value for customers; Not human resources or other capacity building processes (Example: Increase Integration)
- **Financial Stewardship:** How do we maximize value and effectiveness of our mission? (Example: Improve Fiscal Responsibility and Transparency)
- **Learners, Patients, Community and Other Stakeholders:** Through the eyes of the customers and stakeholders, how will our products and services meet their needs? (Example: Increase Access)

Project: A collective endeavor, with a defined beginning and end, undertaken to meet specific goals or objectives and containing specific deliverables.

Stakeholder: Anyone who has a vested interest in the outcome of the organization. Customers are part of the larger stakeholder group. *For Upstate Medical University, this includes accrediting and regulatory agencies and business partners, for example.*

Strategic Initiatives: Projects and action plans that drive results; New or continuing projects and actions designed to improve performance of one or more strategic objectives.

Strategic Management: The comprehensive collection of ongoing activities and processes that organizations use to systematically coordinate and align resources and actions with mission, vision and strategy throughout an organization.

Strategic Objectives: What must be done to be successful over time.

Strategic Plan: The document used to communicate with an organization the organizational goals, the actions needed to achieve the goals and all other critical elements developed during the planning exercise.

Strategic Planning: An organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working towards common goals, establish agreement around intended outcomes/results and assess and adjust the organization's direction in response to a changing environment.

Strategic Themes and Results: Main focus areas of the organization; the organization's 'Pillars of Excellence' used to focus staff effort on accomplishing the vision. For each theme there is a Strategic Result. **Strategic Results** are the desired outcome for the main focus areas of the strategy.

For Upstate Medical University, they are:

- *Integration: One university, connected by mission, integrated by leadership, and aligned through a culture of trust, transparency, and inclusion.*
- *Innovative Learning and Discovery: Destination of choice for patients, innovators, educators, learners, and researchers.*
- *Community Impact: A trusted partner in support of the health and well-being of our communities.*
- *Executive and Growth: An excellent university growing through aligned decision-making, efficient and effective operations, quality services, delivered by a dedicated and diverse workforce.*

Strategy: How an organization intends to accomplish its vision.

Strategy Map: 'The one-page strategic plan.' Defines the causal relationships among strategic objectives driving strategic results; Tells a story of how value is created for the organization's customers; Contains a balanced set of objectives for each of the perspectives; Shows an upward flow of value creation from performance driving (organizational capacity and internal process) objectives to results objectives (stakeholders and financial); and Shows only the predominate links – not every imaginable connection.

Target: The desired level of performance for the reporting period in question.

Threshold: The upper and lower limits of desired performance around a target value.

Values: The organization's beliefs and principles that articulate the culture of the organization.

Vision: A picture of the future. A vivid, emotionally inspiring, time-specific picture of a future to which the organization aspires. *For Upstate Medical University, 'United in expertise, compassion and hope in the creation of a healthier world for all.'*

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