

# Balanced Scorecard Strategy Maps School, Library, and Charter Examples

**Strategy Maps** are used by many social and public-sector organizations to clearly communicate their strategic plans. A good strategy map should identify key “landmarks” such as financial constraints and customer expectations. Strategy maps can also highlight areas that, if neglected, may hinder mission success. Using this map, a leadership team can explain how they expect to achieve success.

In a Harvard Business Review article titled, “Having Trouble with Your Strategy? Then Map It,” Drs. Kaplan and Norton say this about strategy maps:

*“The key to executing your strategy is to have people understand it – including the crucial but perplexing processes by which intangible assets will be converted into tangible outcomes. Strategy maps can help chart this difficult terrain.”*

Strategy maps are first and foremost a communication tool, so they should never be overly complicated or perplexing. While this article is not an exhaustive study, it does include a few strategy map best practices as well as a number of useful examples.

## Strategic Perspectives

Typically, a strategy map starts with a few broad perspectives. Using the Balanced Scorecard methodology, broad areas may include the customer’s perspective of success, a financial perspective of success, an internal process perspective, and a final perspective, learning and growth, which describes culture and capacity. Each of these perspectives serves as a frame of reference for tangible objective statements.



Figure 1: Perspectives in a Nonprofit Organization

## Objective Statements

The next step to build a strategy map is to begin identifying the most critical objectives in each perspective. Objectives are short statements that define what an organization must continually do to achieve its mission. Objective statements can be phrases or complete sentences. They can be written as declarative statements (“We must develop new technology”) or in the voice of the customer (“My family received the best care”).

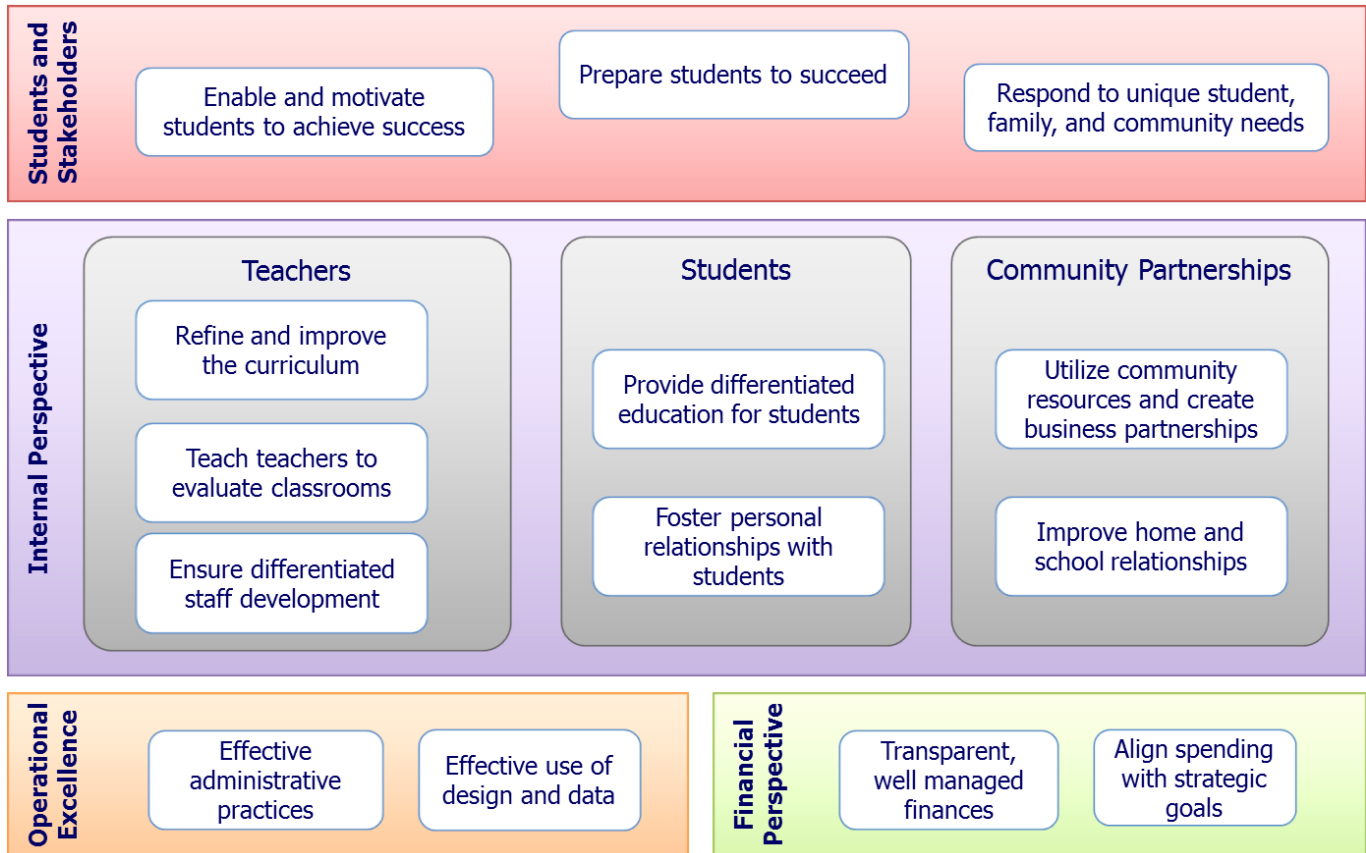
## Building Consensus

Building a strategy map is a team effort that requires real time and discussion, especially at the highest levels of leadership. Each of the example strategy maps below illustrates a strategic plan designed for an organization in a particular situation. Certain maps may have elements that resonate with your team; however, it is recommended that a leadership team only adopt a strategy map after adequate discussion of the situation and selection of the few critical pieces that will contribute to mission success.

# School District

**\*Strategy Map is Modified for Educational Purposes\***

**Provide an exciting, rigorous, and responsive education to each and every student**



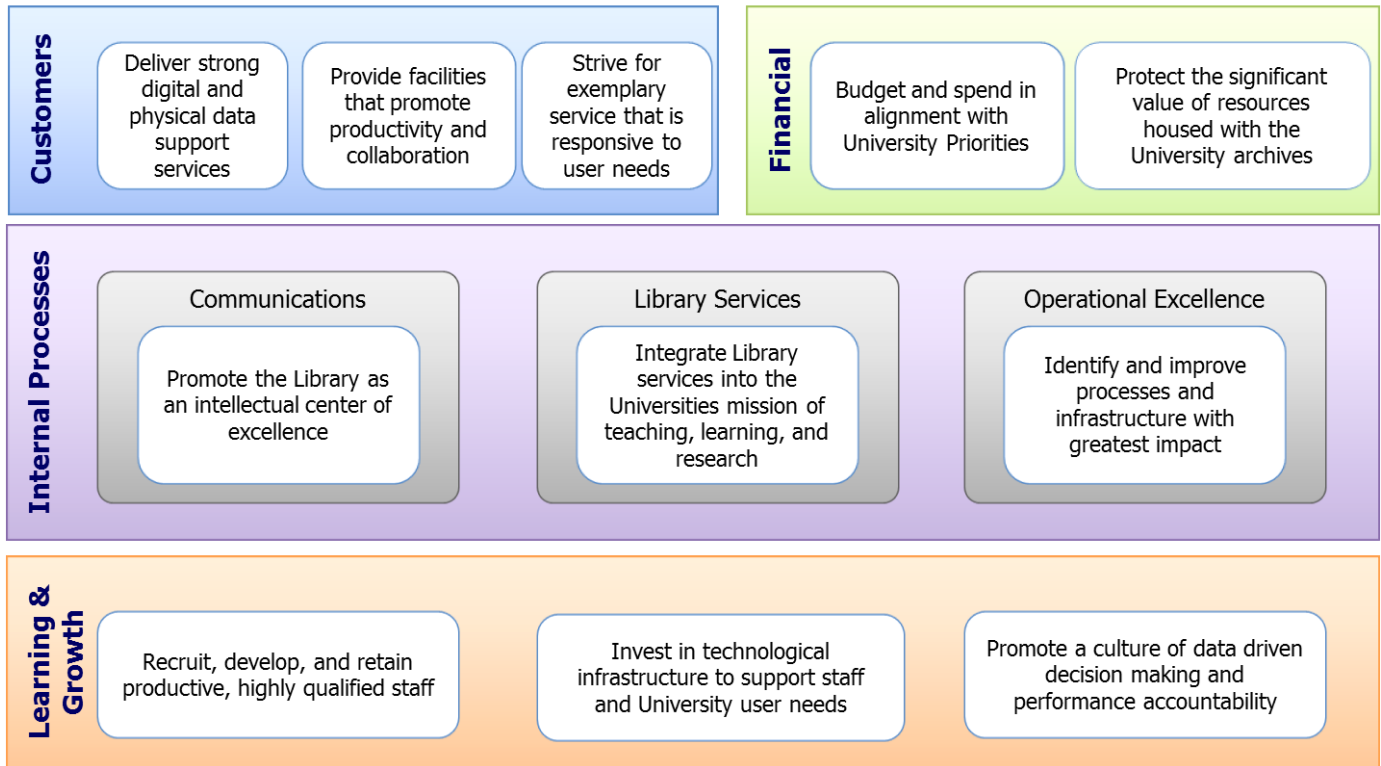
## Example Strategy Map Template for a School District or Primary School System

Schools districts must balance a huge number of stakeholders as well as mandates from a large number of oversight and funding organizations. Because of the diverse range of expectations, a strategy map can be a great framework to talk about objectives, expectations, and where and why investments are required. This is a generic strategy map for a school district and it has both the operational excellence and financial perspectives on the bottom row as a foundation. Next, the internal processes of education and collaboration are the focus of the district's efforts. The top row defines the need to enable students for success, respond to family and student's unique needs, and most importantly to prepare each student for success.

# University Library

**\*Strategy Map is Modified for Educational Purposes\***

**Provide unique assets to the university, faculty, staff, and students all require in their research.**

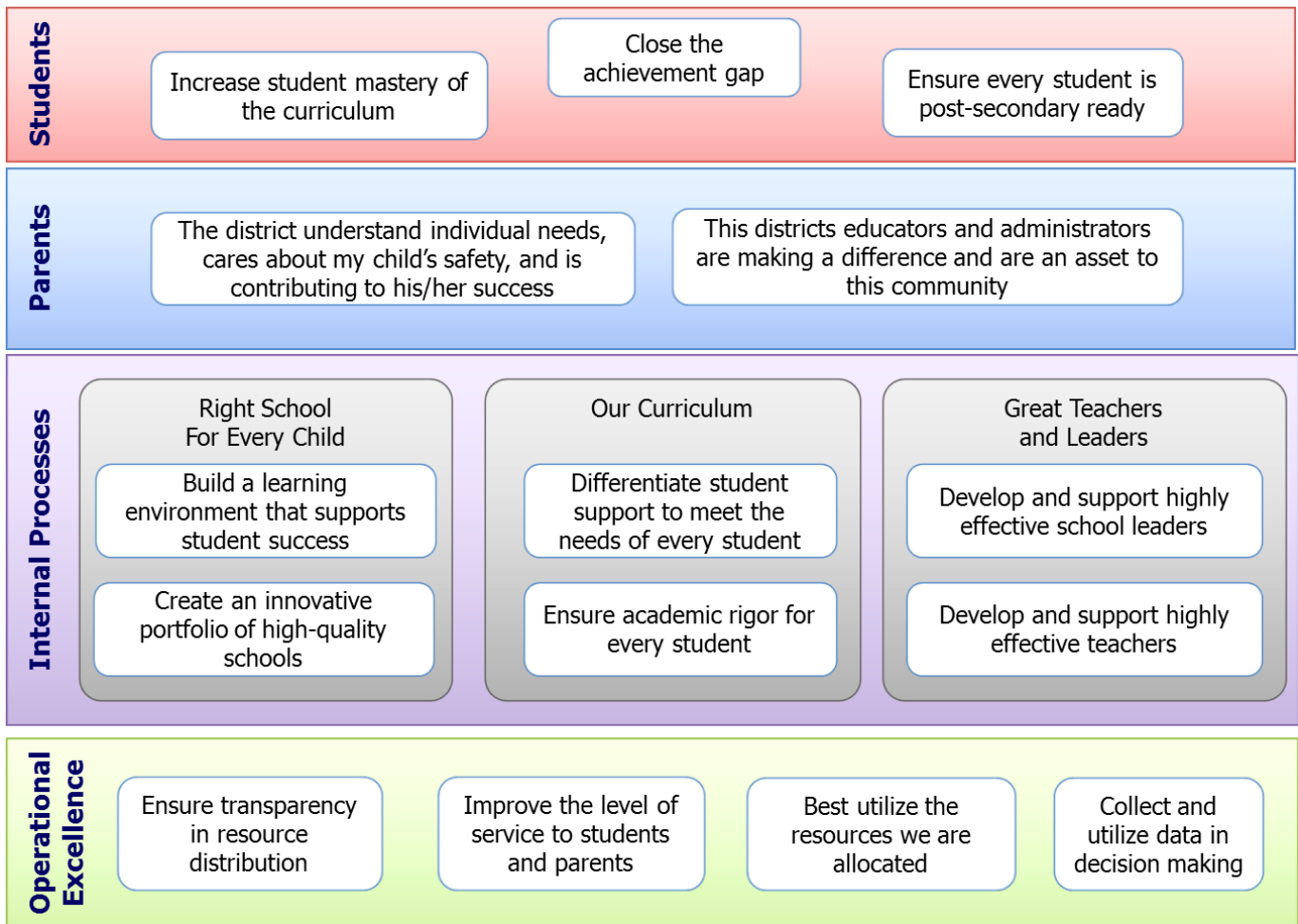


## Example Strategy Map Template for a Collegiate or University Library System

Libraries are an integral part of the education system and they provide a number of services beyond the traditional role of simply housing books. Archival support, workspaces, access to extensive e-libraries, and even citation support are all activities that speed the pace of research, innovation, and education. To balance the many requests a library faces with finite monetary and human capital resources, a libraries leadership team may consider developing a balanced scorecard strategy map such as this example. By defining the libraries objectives and showing the cause-and-effect linkages from staff growth through customer satisfaction, the leadership can use the map to explain strategic plans and reference this mind-map when explaining current needs and the path ahead.

# Urban School System

**\*Strategy Map is Modified for Educational Purposes\***

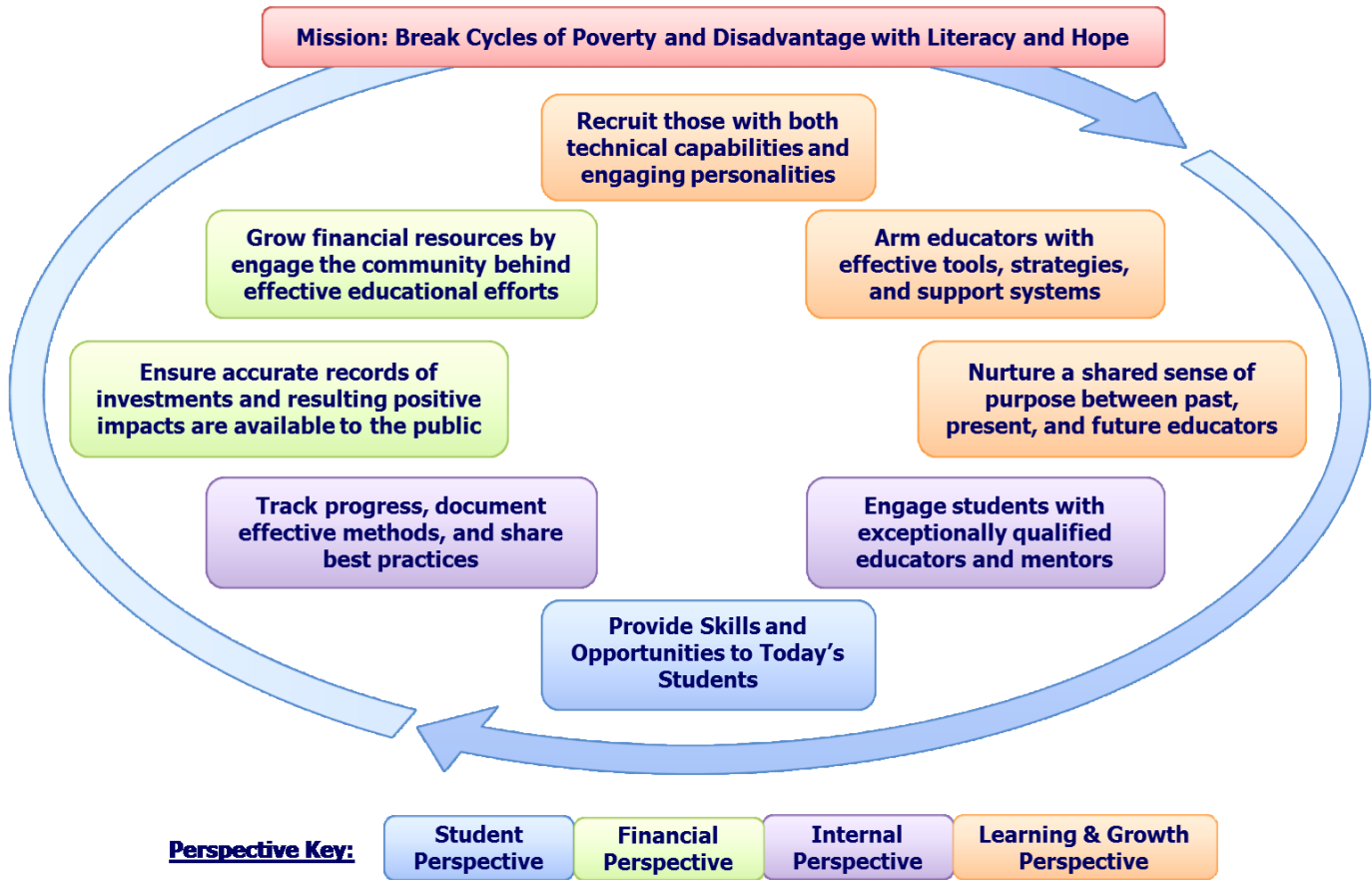


## Example Strategy Map Template for an Urban School System or an Inner-City School District

Urban and inner city school districts face unique educational challenges and are increasing using strategy maps to define broad areas that must be aligned to decrease the educational gaps that tend to appear in historically disadvantaged neighborhoods and districts. Student success requires more than rigorous education. Safety, security, transportation, and even nutritional programs can make all the difference in attendance, a prerequisite for quality education. Using a strategy map, administrators and educational leaders can use this road-map to communicate with parents, community leadership, and even philanthropists to help define needs and highlight successes that culminate with student achievement.

# Teacher Corps

**\*Strategy Map is Modified for Educational Purposes\***



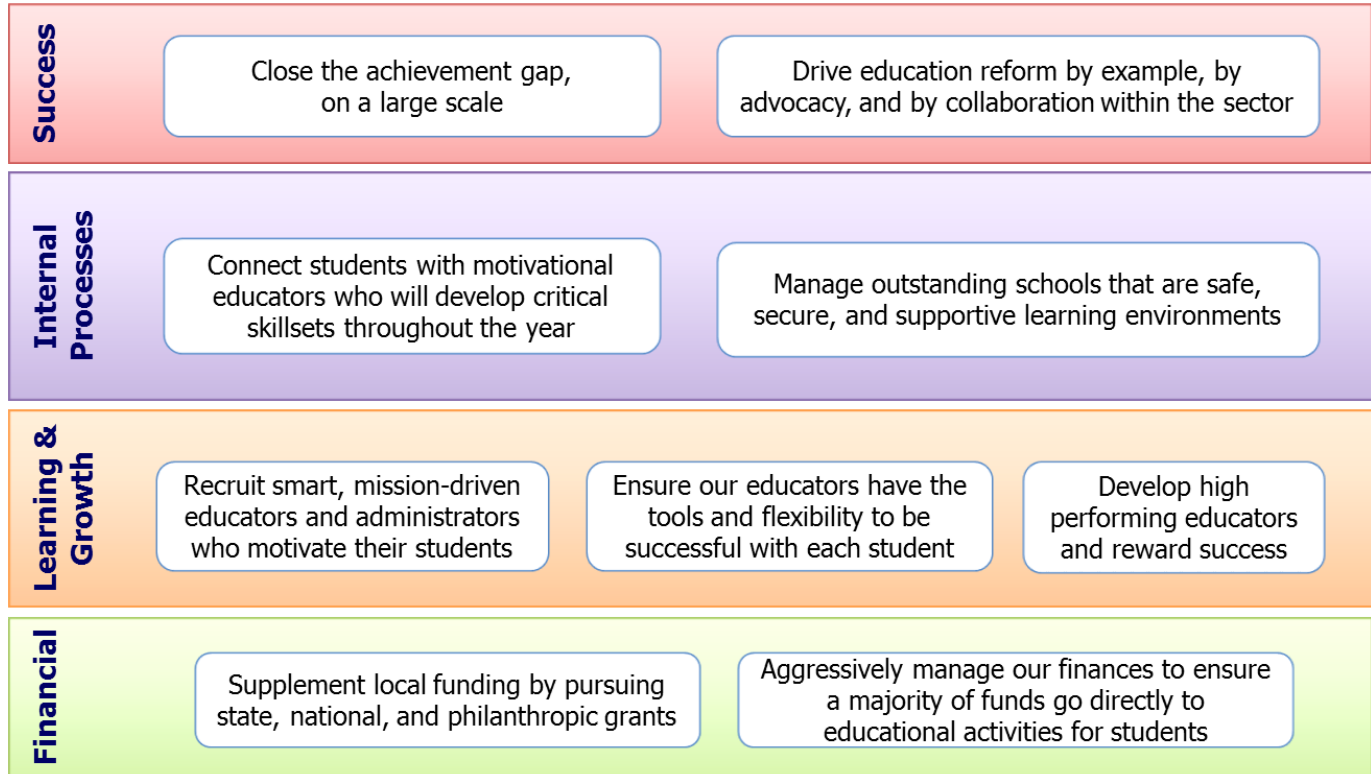
## Example Strategy Map Template for a Teacher Corps or a Volunteer Educational Organization

Education is an exciting opportunity to impact the lives of the next generation. This organization is looking to build on the strengths of the best educators by connecting them with other superb educators and proven methodologies so they can make a real difference in the classroom. This organization is also placing an emphasis on connecting both new and experienced educators to ensure that those who have moved into administrative roles do not become disconnected from the needs of those in the classroom. By recruiting, training, and supporting educators, this organization is seeking to prove their organization can improve the process of delivering effective education to students and communities alike.

# Charter School Management Group

**\*Strategy Map is Modified for Educational Purposes\***

**Improve achievement by placing students in a rewarding and secure learning environment.**



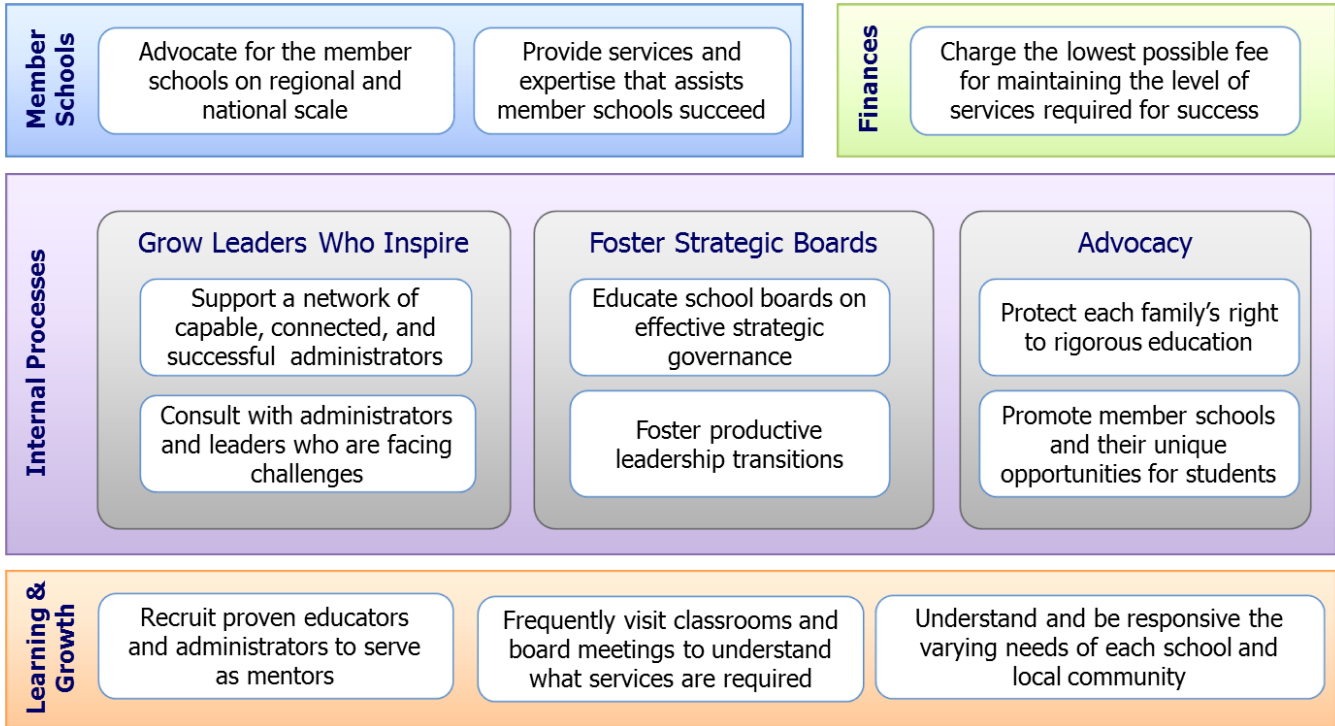
## Example Strategy Map Template for a Charter School

Charter schools can operate with considerable freedom from traditional authority and their leadership needs to be able to communicate and follow up on critical administrative tasks like finances, facilities, and similar operational issues so educators can focus on the classroom. In charter school environments, a Balanced Scorecard strategy map can serve as a reminder of the many objectives that must be managed so students can focus on their studies. Most importantly, a strategy map can serve as a way of allowing parents, potential employees, and funders to discuss the strategic levels of focus required while allowing the charter leadership team to prove they understand and can execute on a new or unique approach to education.

# Association of Religious Schools

**\*Strategy Map is Modified for Educational Purposes\***

**Promote educational success in healthy religious environments throughout our network of member schools.**



## Example Strategy Map Template for Religious, Faith Based, or Parochial Schools

Catholic, Jewish, Christian, Muslim, Hindu, Buddhist, and similar parochial schools may differ on the focus and message of their religious studies but they are all responsible for successfully educating students in core topics such as language, math, science and history. To deliver on this commitment, religious schools of similar interests typically join together to form an association to help spread best practices, advocate on their behalf, and to even to inform parents of the alternatives available to their children. This strategy map is denominationally-generic but it should be viewed as an example of the combination of objectives an association must focus on deliver to add value to the member schools. Strategy maps should be customized for each organization so that it can provide a framework for discussing school needs and the benefits of being a member school.

## Conclusion

Successful strategy maps come in a number of shapes, styles, structures, and complexities. Aside from sector-by-sector differences, varying formats can be found across many languages, cultures, and strategic environments. The one unifying goal is to make a communication tool that engages the entire team and community behind a shared plan of action to achieve the mission at hand.

## To Learn More

The Balanced Scorecard has been the subject of four articles in the Harvard Business Review (HBR); two best-selling business books that have been translated into 19 languages; and numerous case studies and public conferences worldwide. The editors of HBR identified the Balanced Scorecard as one of the most significant management ideas of the past 75 years.

Learn more about the Balanced Scorecard and join the global Balanced Scorecard community at [www.bscwiki.com](http://www.bscwiki.com) and [www.bsccommunity.com](http://www.bsccommunity.com).

## Ascendant Strategy Management Group

Ascendant Strategy Management Group is a professional services firm dedicated to helping associations, foundations, government agencies, and charities drive breakthrough results with the Balanced Scorecard. Founded by professionals with more than 30 years of combined work experience with Drs. Kaplan and Norton, originators of the Balanced Scorecard, Ascendant is uniquely qualified to help organizations manage strategy.

Ascendant offers training, consulting, facilitation, and technology services to clients directly or via a Collaborative Network that encourages group knowledge sharing, learning, and networking. With a singular focus on strategy management, Ascendant's goal is to transfer knowledge and capabilities to improve the management capacity of the not-for-profit sector.

Please visit our website and regularly updated blog at [www.ascendantsmg.com](http://www.ascendantsmg.com) to learn more about developing effective strategy maps and implementing successful strategy management systems.