

## Sample –Balanced Scorecard (Basic)

Note: this sample is for illustration only and should be adapted to fit your own environment and circumstances.

How to create a balanced scorecard for your organization:

1. Establish the performance dimensions that you wish to measure. In the sample below, the dimensions are adapted from those developed by strategy experts Kaplan and Norton. Your performance dimensions and indicators should relate to your Strategic Plan, your agreement with the Ministry, and other key guiding documents.
2. Identify specific performance indicators that can be measured for each dimension.
3. Measure where you are today and use that measurement as a baseline.
4. Set specific targets and performance goals for each indicator.
5. Report (to the Board) quarterly on your progress toward each indicator.
6. Identify specific action to be taken to achieve objectives.

## Sample Balanced Scorecard (Basic)

Note: these are examples only. Dimensions, indicators and targets will be tailored to your own organization.

Dimension	Indicator(s)	Baseline	Target	Actual				Comments/notes
				Q1	Q2	Q3	Q4	
<b>Financial</b>	Balanced budget							
	Actual vs. budget		Variance +/-5%					
<b>People and Learning (Human Resources)</b>	Recruitment targets	70% positions filled	All positions filled by Q3					
	Staff evaluations		All staff evaluated					
	Staff turnover		<10% year-over-year					
	Staff satisfaction							
	Training & development							
<b>Patients and Stakeholders</b>	Patient satisfaction survey							
	Incident reports							
	Patient complaints		Complaints handled <48 hours					
			# complaints					

Dimension	Indicator(s)	Baseline	Target	Actual				Comments/notes
				Q1	Q2	Q3	Q4	
<b>Service Quality &amp; Safety</b>	Incident reports		# reports					
	Patient satisfaction		Survey results >80%					
	Access targets		Third next available					
			Program wait lists					
	Program targets		Program enrolment					
			Program success rates (e.g. smoking cessation)					
		Note: consider success indicators for all programs						

**Red** indicates unmet performance targets

**Yellow** indicates lack of progress, cautions, unmet targets within a range of acceptability (to be defined)

**Green** indicates target performance met