

## Assessment 2: Balanced Scorecard

Name: Balanced Scorecard  
Type: Written plan and design document  
Issued: 8:00 PM AEST Monday of Week 1  
Due: 11:59 PM AEST Sunday of Week 5  
Weight: 35%  
Length: 2000 words +/-10%

**Submission method options: pdf or word submission to JCU learn**

### Overview

This assessment asks you to demonstrate your ability to plan and design a balance scorecard to help executives make strategic decisions based on the relevant information.

**The purpose of the assignment is to enable you to:**

- undertake independent research
- apply topics from the unit
- communicate the findings of a formal piece of work and meet a deadline and
- enhance written communication skills

### Learning outcomes

Related subject learning outcome:

- Apply graphical and numerical tools for organising, analysing, interpreting, and presenting data in a balanced scorecard (2.2.4)

### Work-based skills

This assessment relates to the following work-based skills:

1. The ability to design and write an engagement plan to build a balance scorecard for strategic decision making is an important skill highly sort after in most organisations.

### Background

Balance Scorecard are used in organisations to measure strategic decision outcomes and give a view over performance from both financial and non-financial measures. They provide data and strategy linkages which are becoming increasingly common in the workplace and data science plays a critical role in maintain this linkage through instruments like balance scorecards.

## Assessment Task

Write an engagement plan and draft a design for a balanced scorecard in an organisation that includes both financial and non-financial measures based on its vision and mission. It should capture the critical value creation activities of skilled motivated organizational participants. While retaining an interest in short term financial performance it should reflect the superior long-term competitive performance of the organisation. It should be easy to read and signal to all employees the critical objectives that must be accomplished if an organisation's strategy is to succeed. Each metric needs to link back to a strategic question, requires a clear unambiguous definition and must be SMART (Week 4, Topic 4, Principle 4). The plan should include the organisation engagement to adopt the balance scorecard (e.g. the workshops, planned feedback and executive engagement over a planned timeframe).

For example, if you choose a University as the organisation it should translate the Universities mission and strategy into tangible objectives and measures. It might reflect the learning, teaching and research components of organisation which should clarify the strategic objectives and identify the critical few drivers of the strategic objectives. The measures represent a balance between external measures for academics and students to reflect on, and internal measures of critical operational processes, teaching, research output, innovation, student experience, learning outcomes and growth at a University. Equally the engagement plan should cover the workshops, planned feedback and executive engagement over a planned timeframe to allow for easier adoption of the balance scorecard.

The assignment should include the following:

- Executive summary (one page, single-spaced)
- Brief introduction to the organisation and overview of topics or unit material applied in the assignment
- Analysis and visual presentation of balance scorecard (the bulk of the assignment)
- Conclusions/findings, together with any recommendations and lessons learned
- Appendices, (e.g. keys and definitions) not included in word count

### Assessment criteria:

- Ability to interpret and analyse the organisation's situation
- Write a clear engagement plan
- Ability to apply unit knowledge (i.e. theories, models, concepts, etc.) to analyse the specified organisation
- Ability to logically arrange and present the materials into a well-balanced scorecard across dimensions
  - A visual design that makes it easy to understand and links the long-term strategy and management of the strategy.
- Thoroughness of research undertaken, extent of reading, collection of relevant data with acknowledgment of sources consulted, references used etc. including the bibliography and Key to terms
  - How the information for the scorecard will be derived, with reference sources where possible is part of the assessment criteria.
  - 2000 (+/- 10%) words, 12pt font size with 1.5 spacing. APA referencing

## Submission guidelines

If you use MS Word or any other program, save your work as a pdf for submission.

Your submission for Assessment 2 should be uploaded to LearnJCU as two (2) separate files:

1. The task cover sheet
2. Your work in saved in the following format A2\_balancedscorecard\_firstname\_lastname (PDF format)
  - Length: 2000 words (+/-10%)

## Assessment submission

Include the following in your submission

- Submit a single written document to Learn JCU
- The task cover sheet
- Include your last name and your first name in the file names
- Upload all submission files in one go. You can upload as many times as you want, but only the last submission is graded.

## Marking Criteria: MA5840 Assessment 2: Plan and Design a Balance Scorecard

Criteria	High Distinction (80-100%)	Distinction (70-79%)	Credit (60-69%)	Pass (50-59%)	Fail (0-49%)
<b>Ability to interpret and analyse the organisation's situation with strategic questions</b>  <b>10% of total grade</b>	Demonstrate superior ability to interpret and analyse the organisation's situation with strategic questions.	Demonstrate advanced ability to interpret and analyse the organisation's situation with strategic questions.	Demonstrate credible ability to interpret and analyse the organisation's situation with strategic questions.	Demonstrate limited ability to interpret and analyse the organisation's situation with strategic questions.	Demonstrate poor or no ability to interpret and analyse the organisation's situation with strategic questions.
<b>Written Engagement plan</b>  <b>20% of total grade</b>	Demonstrate superior ability to write a clear unambiguous engagement plan that will help with the balanced scorecard adoption demonstrated with a well-structured, logical and coherent use of language.	Demonstrate advanced ability to write a clear unambiguous engagement plan that will help with the balanced scorecard adoption demonstrated with a well-structured, logical and coherent use of language.	Demonstrate credible ability to write a clear unambiguous engagement plan that will help with the balanced scorecard adoption demonstrated with a well-structured, logical and coherent use of language.	Demonstrate limited ability to write a clear unambiguous engagement plan that will help with the balanced scorecard adoption demonstrated with a well-structured, logical and coherent use of language.	Demonstrate poor or no ability to write a clear unambiguous engagement plan that will help with the balanced scorecard adoption demonstrated with a well-structured, logical and coherent use of language.
<b>Ability to apply unit knowledge (i.e. theories, models, concepts etc.) to analyse the specified organisation</b>  <b>20% of total grade</b>	Demonstrate superior ability to apply unit knowledge (i.e. theories, models, concepts, etc.) to analyse the specified organisation	Demonstrate advanced ability to apply unit knowledge (i.e. theories, models, concepts, etc.) to analyse the specified organisation	Demonstrate credible ability to apply unit knowledge (i.e. theories, models, concepts, etc.) to analyse the specified organisation	Demonstrate limited ability to apply unit knowledge (i.e. theories, models, concepts, etc.) to analyse the specified organisation	Demonstrate poor or no ability to apply unit knowledge (i.e. theories, models, concepts, etc.) to analyse the specified organisation

Criteria	High Distinction (80-100%)	Distinction (70-79%)	Credit (60-69%)	Pass (50-59%)	Fail (0-49%)
<b>Ability to logically arrange and present the materials into a well-balanced scorecard across dimensions with a visual design that makes it easy to understand and links the long-term strategy and management of the strategy.</b>  <b>30% of the total grade</b>	Demonstrate superior ability to logically arrange and present the materials into a well-balanced scorecard across dimensions with a visual design that makes it easy to understand and links the long-term strategy and management of the strategy.	Demonstrate advanced ability to logically arrange and present the materials into a well-balanced scorecard across dimensions with a visual design that makes it easy to understand and links the long-term strategy and management of the strategy.	Demonstrate credible ability to logically arrange and present the materials into a well-balanced scorecard across dimensions with a visual design that makes it easy to understand and links the long-term strategy and management of the strategy.	Demonstrate limited ability to logically arrange and present the materials into a balanced scorecard across dimensions with a visual design that makes it easy to understand and links the long-term strategy and management of the strategy.	Demonstrate poor or no ability to logically arrange and present the materials into a balanced scorecard across dimensions with no clear visual design is not easy to understand and does link to the long-term strategy and management of the strategy.
<b>Thoroughness of research undertaken, extent of reading, collection of relevant data with acknowledgment of sources consulted, references used etc. including the bibliography and Key to terms</b>  <b>20% of the total grade</b>	Demonstrate superior thoroughness of research undertaken, extent of reading, collection of relevant data with acknowledgment of sources consulted, references used etc. including the bibliography and Key to terms	Demonstrate advanced research undertaken, extent of reading, collection of relevant data with acknowledgment of sources consulted, references used etc. including the bibliography and Key to terms	Demonstrate credible research undertaken, extent of reading, collection of relevant data with acknowledgment of sources consulted, references used etc. including the bibliography and Key to terms	Demonstrate limited research undertaken, extent of reading, collection of relevant data with acknowledgment of sources consulted, references used etc. including the bibliography and Key to terms	Demonstrate poor or no research undertaken, extent of reading, collection of relevant data with acknowledgment of sources consulted, references used etc. including the bibliography and Key to terms