

W6: Stewardship of Resources:

Stewarding the Balanced Scorecard

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A primary area of learning I have had to develop since becoming an Executive Director of a non-profit organization is strategic planning and overall project management. I have an innovative mind and thinking of the big picture of our organizational future is easy for me. The strategic way in how we get to that innovation is the challenge. Leaning into the idea of a balanced scorecard for project management has been a great way for me to break down the big ideas I have within our organizational strategic plan and the optimization goals I have been focused on for the last quarter. By being a steward of the balanced scorecard and resource management as a leader, I am able to lead organizational change, facilitate open and honest communication, provide strategic and financial transparency for stakeholders, and uplift the strengths of those around me. The methodology for a balanced scorecard did not come as second nature to me and took a lot of visualization as I was putting one together for my adaptive challenge project.

The first step of putting together my balanced scorecard was to develop the strategic objectives, measures, targets, and initiatives in four key areas: financial, customer base, learning and growth, and internal business. As my adaptive challenge project to increase the trauma informed culture at Willis Dady Homeless Services was already outlined, I had a good starting base for my strategic objectives and initiatives. I was able to identify the following strategic objectives for each area: financial: reducing expenses on staff turnover and developing a sponsorship opportunity for staff reflection room. Customer Base: Develop staff reflection room and increase access to staff training. Internal Business: Implement trauma informed policies and develop a trauma informed strategic plan. Learning and Growth: Implement Agency Wellness Plan and execute annual staff engagement survey. The next steps of developing the targets and initiatives transpired smoothly after I was able to clearly identify the objectives as I was able to

visualize the final goal through the development of the balanced scorecard. After receiving feedback from others, I was able to refine each section, so it was more tangible to accomplish in the timeframe I had set for myself.

The budget section of the balanced scorecard was one of the easier sections for me to complete as I am fairly comfortable putting budgets together through my role as an Executive Director. I decided to set the budget up as I would if I were applying for a grant or putting a budget proposal in front of a funder. I used account numbers from Willis Dady's chart of accounts so when the budget was put into the annual budget, it would be an equal match and not need to be reclassified to a new account. At the time, the only initiative that would require financial support was to create or recreate spaces at Willis Dady to be trauma informed (removing barbed wire at two locations, door installation at employment hub, and the renovation of two vacant office spaces to become reflection/self-care rooms). I made four separate budgets for each financial request and made a section for revenue, wages and payroll expenses, and other expenses. This allowed me to approach one funder for one large funding request of \$9,400 or four separate funders at a smaller scale request varying from \$1,200 to \$6,000.

After developing the budget, I put together a resource list and communication plan. The resource list allowed me to not only identify my stakeholders for the project, but also those that I would leverage as resources or support for my project. I built off previous stakeholder lists I had developed for my project and broke them out into different levels of stakeholders through a stakeholder register for my resource list. I was able to identify personnel resources, financial resources, facility resources, and material resources. It was a benefit to research and determine who would be potential financial donors for the project and what material resources I would need for each part of my balanced scorecard. I had previously only considered the material resources I

would need for the initiative to create trauma informed spaces or the renovations of our offices. The task of looking at all initiatives allowed me to see I would need physical space to hold focus groups, a laptop to develop the survey, and a platform to execute the survey.

The communications plan was a tool that I was able to use throughout the duration of my adaptive challenge project and will use until it is fully executed. The stakeholders I identified in my communications plan included my mentor, Willis Dady's Senior Leadership Team, Willis Dady's Equity and Inclusion Committee, Willis Dady Staff, and Willis Dady's Board of Directors. Not only did the communications plan outline who I would communicate with, but also when I would communicate with them, what I would be communicating with them, and how that communication would happen. For example, I identified that I would provide a written update to the Board of Directors at the January and May 2025 board meetings via my Executive Director Report. In that report, I would provide a high-level overview of the status of my adaptive challenge project compared to the previous report out, milestones met since the last report, any unmet goals and what the barrier was to meeting that goal, and upcoming deadlines.

By being a steward of the balanced scorecard in my project and resource management style, I have been able to provide effective execution of my adaptive challenge project, communicate clearly and cohesively with multiple stakeholders, and meet the deadlines set forth for my adaptive challenge project's measures and targets. It has also allowed me to effectively uplift those within the organization to leverage their strengths and develop their skillset through the communication plan and providing examples of effective project management. This skill has allowed me to show my board and staff that I can be innovative and effectively carry out a project from start to finish and bring to life the future we envision for Willis Dady Homeless Services.