




# Balanced Scorecard and Key Performance Indicator Training Program 2024 - 2026



BALANCED  
SCORECARD  
INSTITUTE



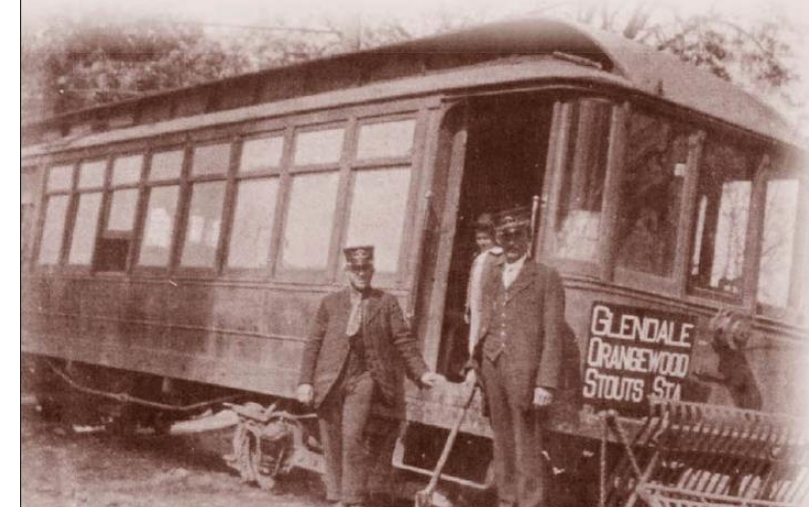
- Interest in training City staff on BSC and KPI basics
- Annually for three years, two groups of up to 10 employees to attend Balanced Scorecard Essentials conducted in a single day or over two consecutive days in 3-hour sessions
- Annually for three years, three groups of up to 10 employees to attend Key Performance Indicator Essentials conducted in a single day or over two consecutive days in 3-hour sessions.
- Training to be conducted virtually



**1911-1926**  
Glendale Division, Phoenix Street Railway Co. of Arizona

**Glendale Extension: 1911-1926**

The Orangerwood Line opened May 5, 1911 with interurban cars #30 and #31 from Sherman Lines in Los Angeles running through a developing agricultural area called the Orangerwood District. The line was financed by area property owners. Electrical power was provided by a substation built at Third Street and Maryland.



The cars carried passengers, freight, express mail, and farm products between Phoenix and Glendale. Unfortunately, the venture was not successful and service ended west of Central Avenue in 1926.

### Course Benefits

As a participant, you will benefit by learning how:

- ▶ Key concepts of the balanced scorecard work together
- ▶ A balanced scorecard can be used to improve organizational performance
- ▶ To assist in the development of strategic objectives and performance measures
- ▶ To help your team successfully build a balanced scorecard system
- ▶ To anticipate challenges and prepare solutions for a more effective implementation
- ▶ To engage leaders and employees in the planning process
- ▶ Other organizations have used the balanced scorecard for continual improvement
- ▶ To summarize all elements of a balanced scorecard

### Course Outline

#### Balanced Scorecard Overview

- ▶ Basic concepts of balanced scorecard systems
- ▶ Basic concepts of performance management and measurement
- ▶ The Balance Scorecard Institute's *Nine Steps to Success™* framework for strategic planning and management

#### Strategic Formulation

- ▶ Program planning and strategic assessment
- ▶ Strategic foundations
- ▶ Strategic Objectives & Strategy Mapping  
**Application Exercise:** Developing Strategic Objectives and Strategy Map
- ▶ Performance Measures & Strategic Initiatives  
**Application Exercise:** Developing Intended Results, Performance Measures and Strategic Initiatives

#### Strategic Alignment

- ▶ Creating alignment through cascading scorecards  
**Application Exercise:** Developing Department/Unit Level Objectives and Measures

#### Strategic Execution

- ▶ Scorecard Rollout
- ▶ Performance Analysis
- ▶ Evaluation  
**Application Exercise:** Summarize all elements into a balanced scorecard

#### Summary & Next Steps

### Participants will learn how to:

- ▶ Create buy-in and a culture of continuous performance improvement
- ▶ Drive performance-informed budgeting and accountability
- ▶ Develop best practice KPIs, performance targets, and management dashboards
- ▶ Improve performance of departments, teams, programs, projects, risks, and individuals
- ▶ Communicate performance information throughout the organization to better inform decision making

### Teaching Style

Senior Associates who facilitate the program use a combination of short lectures, examples, and relevant exercises to help participants learn and apply KPI concepts. Facilitators also share proven instruments, templates, checklists, analysis tools and success stories to reinforce learning.

### Course Outline

#### Key Performance Indicators (KPIs) Overview

- ▶ Basic concepts of KPIs and performance management
- ▶ Connecting leading and lagging measures

#### Developing KPIs

- ▶ The Disciplined process of KPI development
- ▶ Direct and indirect measurement
- ▶ Developing alternative measures
- ▶ Brief introduction to models and tools such as Logic Model and Process Flow

#### Selecting the Right Measures

- ▶ Selecting measurement based on strength, availability, and relevance
- ▶ How and when to develop composite indices

#### Data Reporting

- ▶ Introduction to performance analysis, reporting, data normalization, and visualization
- ▶ Developing baselines and targets
- ▶ Defining and documenting performance measure



- Hands-on Exercises
- Case Studies
- Practical “Real-World” Examples
- Small Working Group Environments
- Interactive Lectures and Discussions
- Develop Understanding By Doing
- Credly Badge Issue

- 10,000 + Trained in the Balanced Scorecard, Key Performance Indicators, Objectives and Key Results, Strategy Execution, and Strategic Project Management
- We are the Original Certifying Body for Balanced Scorecard Certification
- Over 25 Years of Global Experience (in More than 60 Countries)
- Recognized Experts Across Multiple Industry Segments to Include: Education, Government, Military, Healthcare, Banking, Profit and Non-profit Organizations
- Experts in Developing Strategy, Meaningful Performance Measures, Strategic Project Management and Strategy Execution



***“Finally, a comprehensive approach that makes sense and ties all of our tools together”*** –  
Todd Moon, Alcohol & Tobacco Tax & Trade Bureau, Chief Operations Service

***“The Balanced Scorecard Professional Program is an excellent system to implement into your organization in order to align people, resources and projects to your mission and vision, while continuously evaluating and improving performance! The Program is definitely worth any organization's time and money.”*** – Karen Comfort, Associate Deputy Director, United States Department of Agriculture

***“The OKR Professional Course brings clarity, precision, and simplicity to the complex problem of measuring what matters”*** - Dan Colman, Owner of Gray Zone Solutions, LLC

***“The KPIP training opened my eyes to the real methods of how to create lasting measures that truly enhance and improve an organization's performance”*** – Tyler Rodriguez, Management & Program Analyst, US Air Force Manpower Analysis Agency

***“My online learning experience was seamless. The structure of how it was delivered made it a highly comfortable learning space that allowed time for discussions within small learning groups. The 2-week online schedule was welcomed as the scheduling allowed sufficient time for reading, review and preparation for the sessions”*** – Sasha Dhoray, Corporate and Alumni Relations, Arthur Lok Jack Global School of Business





David Wilsey  
CEO



Joe DeCarlo  
VP & Senior Consultant



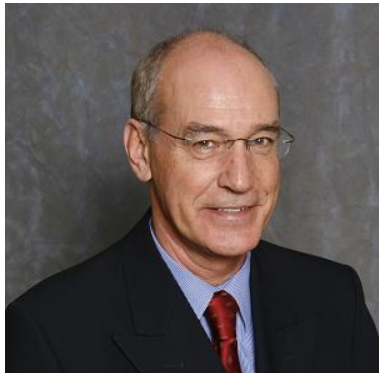
Terry Sterling  
Training Director  
& Senior Consultant



Betty Ellis  
Logistics Manager



Robert McDonald  
Business Development Director



Dr. Sandy McLure  
Senior Consultant



Suzy Nisbet  
Senior Consultant



Henry Gonzalez\*  
Senior Consultant



Susan Sweetman  
Senior Consultant



Dr. Shane Sokoll\*  
Senior Consultant



Alan Fell  
Senior Consultant

## **Option 1: Mornings over 2 Consecutive Days**

Morning Session: 09:00 am – 10:30 am

Break: 10:30 am – 10:45 am

Morning Session (Cont.): 10:45 am – 12:00 pm

## **Option 2: Full-day Session**

Morning Session as Above

Lunch: 12:00 pm – 1:00 pm

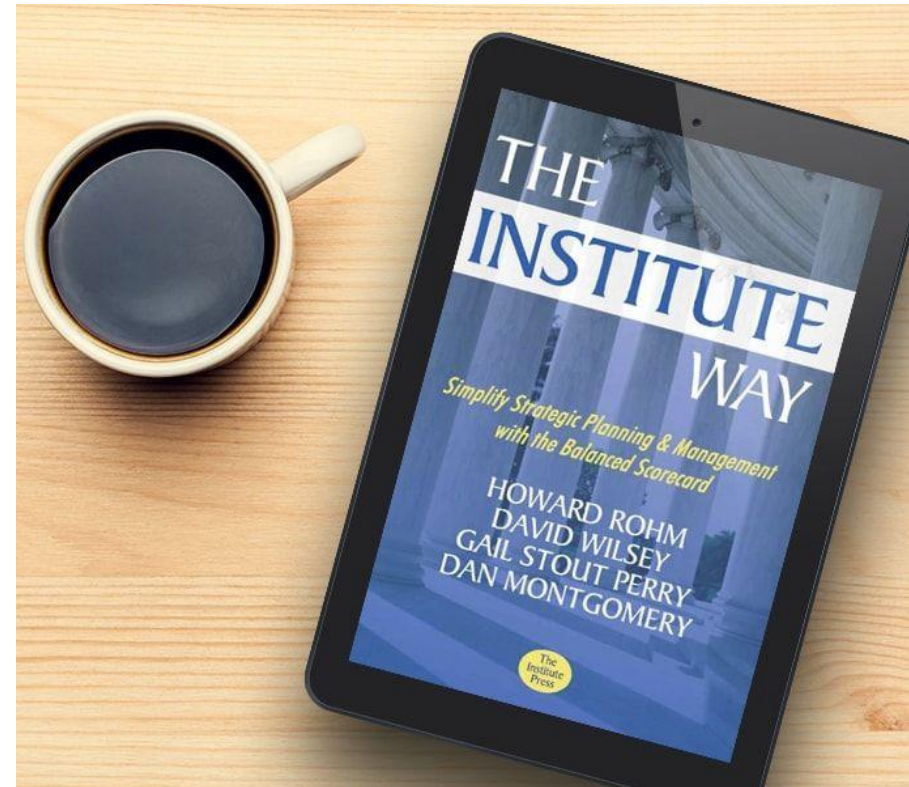
Afternoon Session: 1:00 pm – 2:30 pm

Break: 2:30 – 2:45 pm

Afternoon Session (Cont.): 2:45 pm – 4:00 pm



- Course Instructor(s)
- Instructor Travel Arrangements (Onsite Only)
- All Student Materials
- Miro Platform
- Zoom or MS Teams Platform
- Registration Support
- Professional Services Delivery
- Certificates of Attendance
- BSP Certification Certificate
- Credly Badge for Certifications





- Shipping Costs of Student Materials (if applicable)
- Student Rosters 2 Weeks in Advance of Course Dates
- Individual Laptop Access for Each Participant
- Video and Audio Capabilities for Each Participant
- Participant Understanding Cameras are to Be On During Course

## Online Course Delivery

Course	Number of Courses Per Year	Class Size	Online Course Fee, LMS Access Per Course	Instructor Travel Related Expense	Total Cost
Balanced Scorecard Essentials	2	10	\$ 5,250	NA	\$10,500
Key Performance Indicator Essentials	3	10	\$5,250	NA	\$ 15,750
				<b>ANNUAL TOTAL</b>	<b>\$26,250*</b>

**\*Pricing based on 3-year contract**

## Fees

The pricing is fixed for up to 90 days beyond the proposal date and will be in effect for any agreed-upon work for one year from date of signing of this agreement. Client is responsible for any, and all fees, taxes, and other charges required by client's country or locality.

## Expenses

Shipping of hard copies of Student Packets (if applicable) will be billed at cost to Client. Student Packets are mailed to a single point-of-contact as designated by the client. If applicable, all Instructor travel related costs will be billed, at cost, to client. This includes airfare (economy plus), lodging, meals, rental car, gas and any other related expense.

## Payment Terms

Fees and Expenses are due and payable upon receipt by Client of an undisputed invoice without any deductions or setoffs. Payments utilizing credit cards will be charged a 3% fee. Payment in full prior to the start of the course is required to initiate the work unless other arrangements have been agreed to by all parties. Purchase Orders are acceptable for entities of the United States Federal Government. A signed copy of the "Acceptance of this Proposal" is required prior to the commencement of any course as outlined in this proposal.

## Confidentiality and Privacy

BSI agrees to keep strictly confidential, all information about *Client* or any study findings/data, or any individual or organization studied, except where permission to release this information is provided. BSI agrees to the confidentiality of all information obtained (including that obtained from or about individuals) during the course of a project in accordance with Government or generally accepted industry privacy requirements. BSI will sign necessary confidentially agreements at the request of *Client*.

## Intellectual Property

Ownership of BSI intellectual property used to create and develop the *Client* management system or measurements will remain with BSI. *Client* will have no right, title, or interest of any kind or nature whatsoever in the intellectual property that BSI uses, including the *Building and Implementing a Balanced Scorecard: Nine Steps to Success*<sup>™</sup> framework, and associated training materials, databases, and toolkits.

## Balanced Scorecard Institute

Director of Training: Terry Sterling  
Phone: +1 727-386-9950  
Email: [tsterling@strategymanage.com](mailto:tsterling@strategymanage.com)

Logistics: Betty Ellis  
Phone: +1 919-460-8180  
Email: [bellis@strategymanage.com](mailto:bellis@strategymanage.com)

## City of Glendale, Arizona

Point of Contact: Jenny Durda  
Business Intelligence and Analytics Officer  
Phone: +1 623-930-2241  
Email: [jdurda@glendaleza.com](mailto:jdurda@glendaleza.com)

## ACCEPTANCE

Please lock in the pricing in this proposal by indicating your acceptance of this approval by returning this agreement by fax to: (919) 460-0867, by email to [Contracting](#) or by mail to:

Balanced Scorecard Institute,  
2000 Regency Parkway, Suite 420  
Cary, NC 27518

Submission of a SF182 is acceptable in place of this agreement. By submitting a completed SF182, or in signing this proposal, Client agrees to all the terms listed within this agreement.



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David Wilsey, CEO – Balanced Scorecard Institute  
a Strategy Management Group company

October 30, 2023

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Date

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City of Glendale, Arizona

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Date