2009 BALANCED SCORECARD FOR OFFICE OF CLASSROOM MANAGEMENT

1. MISSION

The mission of the Office of Classroom Management (OCM) is to directly support high quality teaching and learning by faculty and students in University classrooms. **OCM is the primary point of contact, and single point of responsibility and accountability for all Twin Cities general purpose classroom issues.**

2. RESPONSIBILITIES

Classroom Management encompasses all aspects of teaching and learning in classrooms, including support, scheduling, facilities coordination, planning, and technology. Key areas include classroom space utilization, classroom standards, design, infrastructure, faculty orientation/training, planning, funding, and coordination of maintenance. Other functions include maintaining the course database, preparation of class schedules, final exam schedules and course guides. As a unit of Academic Support Resources, the Office of Classroom Management supports both faculty and students as the One-Stop for all central classroom issues.

Web site:  
[www.classroom.umn.edu](http://www.classroom.umn.edu)

Functional Unit Description:

<table>
<thead>
<tr>
<th>OFFICE OF CLASSROOM MANAGEMENT (OCM) UNITS</th>
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</thead>
<tbody>
<tr>
<td><strong>Classroom Support</strong></td>
</tr>
<tr>
<td>Faculty support</td>
</tr>
<tr>
<td>Problem response</td>
</tr>
<tr>
<td>Hotline support</td>
</tr>
<tr>
<td>Training &amp; Help</td>
</tr>
<tr>
<td>Lifecycle costing</td>
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</tbody>
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3. PERFORMANCE MEASURES

Office of Classroom Management
Balanced Scorecard Strategic Perspective

<table>
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<tr>
<th>Financial Perspective</th>
<th>Stakeholder Perspective</th>
<th>Teaching &amp; Learning Excellence in Central Classrooms</th>
<th>Internal Process Perspective</th>
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<tbody>
<tr>
<td>How well do we use resources?</td>
<td>How well do we support faculty &amp; students?</td>
<td>How productive &amp; efficient are we?</td>
<td></td>
</tr>
</tbody>
</table>

The Office of Classroom Management is designated by charter as the agent for managing the Provost’s central classrooms and as the advocate and champion for these important teaching and learning resources.

Created in the Fall of 1999 to significantly improve all aspects of central classroom activity, the University of Minnesota OCM model creates an academically centered 360-degree perspective on classroom teaching & learning. This allows OCM to leverage powerful information and function as the primary subject matter resource, focal point and accountable entity for all classroom issues.

In this effort, OCM strives for collaboration with and feedback from faculty, staff, students and partners. OCM’s methodology is based on establishing standards, using metrics to measure performance, accurately analyzing data, communicating transparent information and reporting to the University community, delivering improvement and results, and implementing systematic management processes to sustain excellence.

This 2009 Balanced Scorecard for the Office of Classroom Management is a measure of the deliverables provided by OCM and as an indicator of the return on investment in the General Purpose Classroom Cost Pool.

This is the fourth year that OCM has provided Balanced Scorecard reporting regarding its performance and services. It is intended as a report to stakeholders and to the University community regarding the performance of the 300 central classrooms in 53 buildings on the Twin Cities campus. This Balanced Scorecard, along with the information contained in the OCM Web site, www.classroom.umn.edu, is part of the effort to inform the two way dialog with the University community regarding its general purpose/central classroom resources.

If you have any questions or would like to meet with an OCM representative to discuss any central classroom issue, please e-mail us at classrm@umn.edu or call 612-625-1086.
OCM Balanced Scorecard Strategic Perspective

Stakeholder Perspective

How well do we support faculty & students?

KPI: Student & Faculty Surveys
KPI: Overall Faculty Satisfaction with All OCM Services
KPI: Classroom Support Hotline - Time to Resolution
PI: Purchase of Standard PCC Technology Systems by Departments
PI: Classroom Tech Services Customer Data

Financial Perspective

How well do we use resources?

KPI: Funding of Lifecycle Cost in Central Classrooms
KPI: Recurring Lifecycle Costs/Funding
  - Per SF, Seat, Student, or Classroom
KPI: Adherence to Central Classroom Standards
KPI: Facility Condition Assessment of Central Classroom Buildings
KPI: Classroom Performance Index (CPI)
PI: Inventory Control Audit Performance
PI: Standard Management Processes
PI: PCC Tech Upgrade Costs vs. Performance

Internal Process Perspective

How productive & efficient are we?

KPI: Central Classroom Utilization Dashboards
KPI: Accuracy of Scheduling Input by Departments
  - Non-conforming Courses
  - Peak Time Usage (60/40 percent rule)
  - Projected vs. Actual Enrollment
  - Excess Course Cancellation
KPI: Campus-wide Scheduling Process Improvement Initiative
KPI: Departmental R25 Performance & Utilization Dashboard
KPI: UMTC Projection Capable Classrooms (PCC)
KPI: Central Classroom Daily Readiness
PI: Implementation of Standards
PI: Total Event and Courses Processed

Innovation & Learning Perspective

Can we sustain excellence over time?

KPI: OCM Staff Development
KPI: OCM Staff Innovation

KPI: Key Performance Indicator
PI: Performance Indicator
Stakeholders Perspective:
How well does OCM support faculty & students in classrooms?

Key Performance Indicator: Student & Faculty Surveys

Student Rating of Teaching (SRT) Survey
General Purpose Classrooms (Scale of 1 to 7)

How would you rate the physical environment in which you take this class, especially the classroom facilities, including your ability to see, hear, concentrate, and participate?

* New survey format implemented Spring 2008

Faculty Survey
Rating Satisfaction of General Classrooms

Academic Year 2007-08
Academic Year 2008-09
Key Performance Indicator: Overall Faculty Satisfaction with All OCM Services

Key Performance Indicator: Classroom Hotline Time to Resolution

Other Performance Indicators:

- Classroom hotline; faculty support for operations, procedures, training programs and standards. The hotline averaged 1,113 calls per semester for the 2008-09 academic year.

- OCM’s Projection Capable Classroom (PCC) standard system in 292 central classrooms is so successful that departments and colleges have purchased 162 systems for their own spaces. Faculty report that a major benefit is having the same system operating protocol and interface available throughout campus.

- In addition to being the OCM technology department, Classroom Technical Services (CTS) is an Internal Service Organization (ISO) business unit that is the vendor of choice for campus audiovisual work, accomplishing 74% of all University of Minnesota audiovisual installations. Repeat customers account for 90% of CTS installations.
Financial Perspective: How well do resources support central classrooms?

Key Performance Indicator: Funding of Lifecycle Cost in Central Classrooms

Classroom Lifecycle Requirement vs. Recurring Funding

- Funding under the budget model is below total lifecycle requirements but is sufficient to support current classroom operations.

Key Performance Indicator: Recurring Central Classroom Lifecycle Operations Costs (Fiscal Year 2010)

<table>
<thead>
<tr>
<th>Costs per Classroom Square Foot/Year</th>
<th>Costs per Student/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sq Ft (330,000)</td>
<td>Total Students (51,140)</td>
</tr>
<tr>
<td>Requirement ($/SF) $20.05</td>
<td>Requirement ($/Student) $129.36</td>
</tr>
<tr>
<td>Actual Funding $13.55</td>
<td>Actual Funding $87.44</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Costs per Classroom Student Seat/Year</th>
<th>Costs per Classroom/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Seats (20,400)</td>
<td>Total Classroom (300)</td>
</tr>
<tr>
<td>Requirement ($/Seat) $324.29</td>
<td>Requirement ($/Room) $22,051</td>
</tr>
<tr>
<td>Actual Funding $219.21</td>
<td>Actual Funding $14,906</td>
</tr>
</tbody>
</table>

NOTE: At time of this report, the impact of un-allotment and potential funding reduction in the General Purpose Classroom Cost Pool in FY 10 has not yet been finalized.
FINANCIAL PERSPECTIVE (cont.)

Key Performance Indicator: Adherence to Central Classroom Standards

Central Classrooms Meeting Established Standards

<table>
<thead>
<tr>
<th>AREA</th>
<th>PCT</th>
<th>CRITERIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting</td>
<td>49%</td>
<td>UM Facilities Construction Stds Appendix DD</td>
</tr>
<tr>
<td>Acoustics</td>
<td>13%</td>
<td>UM Facilities Construction Stds Appendix DD</td>
</tr>
<tr>
<td>Accessibility</td>
<td>87%</td>
<td>UM Facilities Construction Stds Appendix DD</td>
</tr>
<tr>
<td>Furniture</td>
<td>87%</td>
<td>UMTC OCM Lifecycle</td>
</tr>
<tr>
<td>Technology</td>
<td>98%</td>
<td>UMTC Projection Capable Classroom Std</td>
</tr>
</tbody>
</table>

- OCM has increased classroom accessibility by **60%** over the past ten years.

Key Performance Indicator: Facilities Condition of Central Classroom Buildings

Facilities Condition Assessment of Central Classroom Buildings

<table>
<thead>
<tr>
<th>Building Type</th>
<th>Facilities Condition Needs Index (FCNI)</th>
<th>Average Building Age (Years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buildings with Central Classrooms</td>
<td>.48</td>
<td>48</td>
</tr>
<tr>
<td>All UMTC Buildings</td>
<td>.41</td>
<td>43</td>
</tr>
</tbody>
</table>

Source: FM’s Facilities Condition Assessment (FCA), June 2009

- These FCNI scores indicate that central classroom buildings, in the aggregate, are older, and have a lower assessed facilities condition, than campus buildings overall.

Key Performance Indicator: Classroom Performance Index (CPI)

Classroom Performance Index
Average Score by Location (Scale 1 to 4)

Excludes new acquisition and temporary classrooms

- Classroom Performance Index (CPI) is an OCM developed system that correlates twenty-three critical classroom performance measures into a relative ranking index and decision aid. The CPI’s twenty-three criteria cover classroom condition, design performance, operational performance, and user satisfaction. The CPI has a one to four ranking scale: one, fail; two, poor; three, fair; and four, good. The CPI is used as a decision aid for allocating scarce classroom project resources into classrooms with the greatest need.
Internal Process Perspective:
How productive and efficient is OCM in delivering service?

Key Performance Indicator: Central Classroom Utilization

Note: An interactive version of this dashboard is located at www.classroom.umn.edu

Other Performance Indicators:

- Inventory controls and procedures implemented for all high value classroom technology equipment. Achieved a 100% accuracy report/zero error rate on the biennial PAMS report audit for 2009, the third consecutive year of 100% audit accuracy.

- OCM’s management of $16.7M of classroom furniture, fixtures and equipment (FFE) and $6.9M of classroom technology is based on a systematic lifecycle approach characterized by metrics, standards, application of economies of scale, focus on readiness and thoughtful use of preventative maintenance.

- Application of economies of scale, “best-practices” in procurement and smart application of technology advances has reduced average technology upgrade cost by 36% while improving system performance by 300% over eight years.
Minneapolis campus attained 65% (8am - 5pm) and 72% (9am - 2pm peak) time utilization. Within these measures, both East and West Bank experienced central classroom shortages during specific time periods (darker colors in utilization grid).

St. Paul continues to be significantly under target, with 46% (8am - 5pm) and 51% (9am - 2pm peak) time utilization, reflecting insufficient demand for existing St. Paul central classroom inventory for a majority of the time periods (spot shortages in some room sizes do occur at select time periods on Tuesday/Thursday).

These utilization dashboards illustrate the desirability of spreading the course load more evenly across days of the week and hours of the day. They also demonstrate the ability of the St. Paul campus to absorb additional course loading.
INTERNAL PROCESS PERSPECTIVE (cont.)

Key Performance Indicator: Accuracy of Scheduling Input by Departments

Great emphasis has been placed on providing departments with improved tools with which to more accurately submit instructional requirements to the Scheduling unit. System and business process changes and upgrades include the PeopleSoft - Scheduling interface (PSSA transactional interface), the Electronic Course Scheduling (ECS) system, improved Scheduling software (Resource 25) and ECS-IMS Data Warehouse reports that provide on-demand information tailored to departmental and collegiate needs. These changes provide departments with the ability to rapidly review their scheduling performance based on the following four key measures. Trends indicate that departments needed greater emphasis on enrollment management and accuracy of their scheduling input, resulting in the Scheduling Process Improvement initiative in November, 2008 (see following KPI).

- **MEASURE**: Non-conforming Course Sections
  - **TARGET**: 0% Non Standard
  - **TREND**: Above target
  - **IMPACT**: Creates course access problems for students by blocking multiple meeting periods, reduces efficient use of classroom space, and causes unplaced courses.
  - **STRATEGY**: Move non-conforming courses to standard time. (See Scheduling Process Improvement KPI)

- **MEASURE**: 60/40 Use of the 9 - 2 Peak Time Period
  - **TARGET**: Max 60% of meeting time scheduled during peak
  - **TREND**: At global target
  - **IMPACT**: Peak demand drives inventory, especially for certain times on Tuesday and Thursday. Use of global (60/40) metric masks spot shortages.
  - **STRATEGY**: Spread courses across standard times and all five weekdays. (See Scheduling Process Improvement KPI)

- **MEASURE**: Projected vs. Actual Enrollment
  - **TARGET**: +/- 10%
  - **TREND**: Above target, recently increasing
  - **IMPACT**: Over-projected enrollment creates artificial demand, significantly impacting scheduling, room availability, and student access to courses.
  - **STRATEGY**: Set enrollment limits and requested room capacities based on previous term’s course enrollment. (See Scheduling Process Improvement KPI)

- **MEASURE**: Excess course cancellation
  - **TARGET**: 5%
  - **TREND**: Above target and increasing significantly, especially for spring
  - **IMPACT**: Requesting rooms above actual need causes inefficient use of classroom space and reduces room availability.
  - **STRATEGY**: Reduce submission of courses that are not going to be taught. (See Scheduling Process Improvement KPI)
INTERNAL PROCESS PERSPECTIVE (cont.)

Key Performance Indicator: Campus-wide Scheduling Process Improvement Initiative

In response to the Scheduling Accuracy KPIs identified above, and to accommodate a significant future reduction in Minneapolis campus classroom inventory (16 classrooms, 1630 seats), OCM embarked on a collaborative initiative with colleges and departments during the fall semester 2009 scheduling production cycle starting in November, 2008. Project goals were to absorb the inventory reduction when Science Classroom Building went off line for construction, to improve course access for students and to provide improved course meeting information to students and faculty at the beginning of registration. Preliminary results:

- Non-standard courses were reduced from 1,208 to 554 (fall 09 vs. fall 08), dramatically improving utilization and course access for students. Additionally, the increased conformity with standard day and time patterns also allowed the creation of additional 75-minute 3-credit course times, responding to long-desired faculty requirements.
- Unplaced courses at start of registration were reduced from 1,050 to 151, providing the most accurate scheduling information for students at time of registration since semester conversion.
- Improvements were realized in spreading of courses over days and weeks, in leveraging R25 data to improve utilization of departmental classrooms, and in substantially reducing over-projected course and enrollment errors.
- Specific system, process and policy changes were identified as continuous improvement initiatives for 2010.

Reduction in Unplaced Courses at Start of Student Registration - Fall 2009 vs. Fall 2008

Key Performance Indicator: Departmental Resource 25 (R25)

Utilization of departmental classrooms (as opposed to general/central classrooms) is not within the purview of OCM, as the control, scheduling, and resourcing of these spaces rests with the cognizant college or department. As a service, OCM provides R25 software, licensing, training and schedule viewers to departments.

At the direction of the Provost, Departmental Resource 25 is required for all departmental classrooms. There are currently 282 users from 78 departments/programs representing 19 colleges/units using R25. The R25 departmental expansion provides the campus community with a proven business practice and a tool to measure, track, and improve utilization of departmental classrooms used for course and event activity.

Voluntary R25 use for other spaces includes: the College of Biological Sciences and Veterinary Medicine are scheduling laboratories, while non-academic events are being scheduled by Recreational Sports, Weisman Art Museum, and Walter Library SMART Learning Commons. Additionally, computer labs are being scheduled by OIT Computer Facilities and Learning Spaces (formerly ADCS) and Interprofessional Education Resource Center (IERC) is scheduling facilities and simulation equipment. In addition to the 300 central classrooms, there are 900 other spaces being scheduled in R25.
INTERNAL PROCESS PERSPECTIVE (cont.)
Departmental Classroom Utilization Dashboard

The departmental classroom utilization dashboard is a tool to assist departments and colleges in maximizing the utilization of their classrooms.

Note: An interactive version of this dashboard is located at www.classroom.umn.edu

Key Performance Indicator: Tech Upgrade Plan Results

UMTC Projection Capable Classrooms (PCC) by Campus Location (Fall 09)

- In 1999, only a few University of Minnesota Twin Cities central classrooms had any video-data projection capability, and we were not meeting the needs of faculty or the expectations of students for classroom technology. Today, with 98% of central classrooms being technology enabled, the University of Minnesota Twin Cities is a Big Ten and national leader in the important area of teaching and learning technology in central classrooms.
**INTERNAL PROCESS PERSPECTIVE (cont.)**

### Key Performance Indicator: Central Classroom Daily Readiness

**Daily Operational Readiness for Central Classrooms**

<table>
<thead>
<tr>
<th></th>
<th>Academic Year 2007-08</th>
<th>Academic Year 2008-09</th>
<th>Yearly Trend</th>
<th>Monthly Trend with Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of classrooms inspected - (Classrooms Inspected/Total Number of Classrooms)</td>
<td>39%</td>
<td>62%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilities - Percentage of classrooms passing initial inspection - (Classrooms Ready/Classrooms Inspected)</td>
<td>71%</td>
<td>76%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology - Percentage of Projection Capable Classrooms (PCC) ready, monitored in Classroom Automated Management System (CAMS) - (Classrooms Ready/CAMS Monitored Classrooms)</td>
<td>99%</td>
<td>99%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of inspections generating FM Service Request discrepancies - (OCM Service Requests/Classrooms Inspected)</td>
<td>17%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage if inspection discrepancies corrected on the spot - (OCM Problems Resolved/Classrooms Inspected)</td>
<td>7%</td>
<td>7%</td>
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</tr>
</tbody>
</table>

- OCM generated 2,192 FM Service Requests during the academic year. Inspections are based on a fourteen item checklist covering physical room condition and Facilities Management service level agreement areas.
- OCM visually inspects 100% of the general classrooms every two days. Starting fall 2009 technology in 100% of general classrooms will be continuously monitored remotely in CAMS compared to 92% for fall 2008.

### Other Performance Indicators:
- Design, construction and performance standards for UMTC Central Classrooms were coordinated with the University community, published, and implemented for both Classroom Facilities and Technology areas.
- OCM processed 36,315 course section and 12,544 event reservation requests for the 2008-09 academic year.

### Learning & Innovation Perspective:

**Can OCM sustain excellence over time?**

### Key Performance Indicator: OCM Staff Development

**OCM Staff Development Indicators 2008-09**

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Advanced/Promoted</td>
<td>22%</td>
</tr>
<tr>
<td>Attended professional conferences, development or training programs</td>
<td>78%</td>
</tr>
<tr>
<td>Attained certification, license, degree or formal professional designation</td>
<td>32%</td>
</tr>
<tr>
<td>Participated in Regents Scholarship program</td>
<td>27%</td>
</tr>
<tr>
<td>Formal Presentations</td>
<td>106</td>
</tr>
<tr>
<td>Retention</td>
<td>98%</td>
</tr>
</tbody>
</table>
LEARNING & INNOVATION PERSPECTIVE (cont.)

Key Performance Indicator: Innovation by OCM Staff

OCM staff have demonstrated the continuing ability to generate innovative solutions to classroom teaching & learning needs, the ability to collaborate with the University community regarding these innovations, and the ability to successfully implement them on the large scale that is required at the University of Minnesota. Examples:

Innovation
- Active Learning Classrooms (ALC)
- Digital Signage and Dynamic Digital Signage
- General Purpose and Departmental Scheduling Dashboards
- Classroom Performance Index (CPI)
- www.classroom.umn.edu Website
- Enhanced tablet display classroom technology pilots/options
- Scheduling and reporting solutions adopted by System 25 vendor
- Camtasia relay pilot program and class capture development
- Prototype for a rapid deployment technology system
- Informal Learning Space initiatives

Best Practices
- OCM’s Balanced Scorecard
- FM Computerized Maintenance Management System (CMMS) reports partnership
- Enhanced Projection Capable Classroom (PCC) System
- Enhanced Classroom Automated Management System (CAMS)
- Classroom Equipment Theft Alert System
- Revised classroom standards (University of Minnesota Construction Standards - Appendix DD)
- Unique classroom metrics, methodology, and reporting
- OCM’s unique synergistic management model for classrooms
- NTS/VLAN partnership project for classroom networking and telecommunication services
- OIT partnership to upgrade wireless networks
- Alternate-fuel vehicles provide 75% of OCM vehicle transportation requirements

Economies of Scale in Classroom Operations
- Classroom lifecycle cost model
- Leveraged partnership agreements and programs with colleges
- Classroom systematic lighting re-lamping
- Partnership with FM Energy Management to redesign and replace lighting
- System-wide classroom clock management system
- Departmental classroom R25 initiative
- R 25 expansion initiative