



## **OBTC 2016 at Walsh University** **June 8<sup>th</sup> – 11<sup>th</sup>, 2016**

### **Submission Template**

#### **SUBMISSION GUIDANCE**

*\* Remove all identifying properties from this document \**

*\* All files must be saved in PDF format \**

*\*Please include ALL supplementary text at the end of this document\**

*\*Only one document should be submitted\**

## Submission Template for the 2016 OBTC Teaching Conference for Management Educators

### 1) Peer Evaluations utilizing a Balance Scorecard Approach

*Peer evaluations suffer from several biases including anchoring, ambiguity, empathy, framing, attribution, recency and many more. Developing an appropriate tool utilizing a Balance Scorecard will, in theory, allow students to better evaluate their own and their peer's performance during the term.*

*The Balance Scorecard typically takes into consideration four specific and equally weighted areas allowing for an effective view of overall performance. In a peer evaluation format, two indicators for each of the four categories are selected by the involved team.*

*Indicators and metrics are determined following a workshop developing options for teams to come to a consensus for using. Each team may have a different scorecard based on participants.*

*This session walks through the overall concept. Then participants will develop a balance scorecard for the session by working through the indicator and metric development workshop.*

### 2) Format

- ☒ Activity or exercise
- ☐ Roundtable discussion (60 minute only)
- ☐ General discussion session

#### 2a) For activities and exercises only, is yours best suited for

- ☒ A traditional classroom
- ☐ An online class
- ☐ Either

#### 2b) For activities and exercises only, is yours best suited for

- ☐ Undergraduate students
- ☐ Graduate students
- ☒ Either

### 3) Time Requested:

- ☐ 30 Minutes
- ☒ 60 Minutes (*Roundtables must select 60 minutes*)

\_\_\_ 90 Minutes

#### 4) Planning Details:

No equipment is *necessary*.

#### 5) Teaching Implications:

*What is the contribution of your session to management pedagogy/andragogy? Specifically, please include your learning objectives, and describe what management and/or teaching topics are relevant to your session, and why. Also, include theoretical, disciplinary, or theoretical foundations that will help reviewers understand how your ideas fit within the broader field of management.*

*The objective of the Balance Scorecard method within the classroom is to introduce, develop, and utilize a human resource management tool in assessing employees and peers. Implications of using this tool are two-fold:*

- 1. Introduce students to Kaplan and Norton's tool that allows for a wide-ranging view of an entity's performance that looks at both outcome and process measures. Performance should be viewed and measured throughout an entity versus relying on only one or two specific items and take into consideration financial, employee, customer, and operational perspectives.*

The balanced scorecard focuses on linking the organizational objectives with specific measures (Bose, 2004; Kaplan & Norton, 1993). These specific measures come in the form of metrics that are standardized for the specific operation (or team) utilizing them. Bose (2004) affirms that identifying relevant measures for a specific business or entity directly improves the quality and effectiveness of the feedback provided by those measurements. Metrics are available throughout all aspects of business and provide a method to create a specific definition.

The balance scorecard tool translates well into the human resource performance appraisal beyond its development as a strategy development and analysis instrument (U.S. Office of Personnel Management, 2015). Often, employee behavior is interpreted and measured without taking into consideration results that person has helped attain. A balance scorecard approach to employee performance assessment allows the organization to align the goals and mission of the entity to the expected focus and performance of the employee. This allows for a robust picture that helps the employee to understand where the bulk of their efforts need to be or should be focused.

Likewise, in an academic setting utilizing teams, a balance scorecard approach used within a peer evaluation system allows for more objective measures of that person's performance. Each person within that team is measured based on the same scorecard that is developed based on the goals of the people involved with that team. Lane (2012) writes: "When implemented successfully, student-to-student peer feedback can reduce social loafing, improve team cohesion, and reinforce preferred behaviors."

Using a balance scorecard method for teams to develop their own peer evaluation assessment is a first step for developing team cohesion and a means for members to understand and manage expectations within the class. Additionally, it introduces a method for comprehensive evaluations and a corporate strategic instrument.

2. *Decrease the bias that occurs within the peer evaluation system, increase the objectivity found within peer evaluations, and to understand the value in accurately measuring your peers (and, eventually, future employees) performance.*

Lane (2012) discusses multiple factors that come into play with students developing their own indicators to measure peer performance. Three specific and important are: 1) interpreting their own past positive and negative experiences and generating *specific* criteria from them. 2) Generate *consensus* across the team as to the team's mission and most important criteria that fit the mission. 3) Determine *exactly* how the criteria will be measured and how data will be collected to determine final criteria scores.

Peer evaluations are a common thread throughout our programs and, at a minimum, count for 10% of each student's course grade. As such, methods are debated consistently within our department. The balance scorecard method allows for student teams to focus evaluation on what they feel is most important, to determine the metrics by which assessment will occur, and to reduce emotion found in the mid-semester and final peer assessment. These actions have led to a perceived reduction of bias on the student and instructor's part. (This is informal feedback. It has not been statistically measured as of yet. The analysis of this is ongoing.) As one of the goals of peer assessment is fairness, the balance scorecard allows for each team to completely own the process.

Evaluating performance is expected to be a responsibility for many students completing a management program. As such, utilizing a human resource instrument like the balance scorecard in a safe classroom environment allows for individuals to understand the process, instrument, and feedback requirements and to put it to practice prior to completing their degree.

Bose, R. (2004). Knowledge management metrics. *Industrial Management & Data Systems*. 104 (6), 457-468.

Kaplan, R.S. & Norton, D. P. (1993). Putting the Balanced Scorecard to Work. *Harvard Business Review*. 71 (5), 134-147.

Lane, D. R. (2012). Peer feedback processes and individual accountability in team-based learning. In M. Sweet & L. K. Michaelson (Ed), *Team-Based learning in the social sciences and humanities* (pp. 51-62). Sterling, VA: Stylus Publishing.

U.S. Office of Personnel Management. (2015). *Using a balance scorecard approach to measure performance*. Retrieved from <https://www.opm.gov/policy-data-oversight/performance-management/reference-materials/historical/using-a-balanced-scorecard-approach-to-measure-performance/>

## 6) Session Description and Plan:

Introduce participants and introduce the HR version of Balance Scorecard thinking.  
(5 - 10 min)

Discuss (and document) the good and bad of personal team/group assignment experiences. (5 - 10 min)

Provide a specific project and determine the mission of the participants based on rational consensus. (10 min)

Create the most important criteria to complete the mission (based on the positive and negative experiences previously documented) and develop a rational consensus of the best eight. (10 min)

Build the balance scorecard in the specific indicators based on the previous step. (5 min)

Develop the specific metric criteria on how each indicator will be measured and its target. (10 min)

Evaluate the final balance scorecard model for objectivity and determine methods to generate a more complete picture. (5 – 10 min)

*Engagement occurs throughout because the balance scorecard will be created based on the participant's experiences, wants, and expectations.*

## 7) Application to Conference theme:

The uniqueness of OBTS and OBTC is that it is a gathering of people who are committed to doing what's right for the student and their peers. Our goals of attending and presenting at OBTC are to better ourselves and better others. We could not do that unless we were externally focused on who we work for and with. To be United in Service means we are working to serve our peers by demonstrating, sharing, questioning, and helping others to become better participants in their classrooms, offices, and campuses. To be United in Service means we act selflessly in helping our students to grow and mature. The *Peer Evaluations utilizing a Balance Scorecard Approach* presentation is about helping others understand a method of helping our students become more objective, fair, and unbiased evaluators of themselves and their peers.

## 8) Unique Contribution to OBTC:

*Has not been presented before.*