

Motivating Employees Using a Balanced Scorecard

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Abstract: This study explores the journey of Arctic Cooperatives Limited, a medium-sized Canadian cooperative that, in 2018, adopted an important change in strategic direction with far-reaching impacts. This paper examines one element of this change, the implementation of a Balanced Scorecard inspired by the work of Côté (2019). This study examines whether a relationship exists between the implementation of a Balanced Scorecard and employee motivation and morale. To test for the presence of such a relationship, employee engagement data were collected for the years 2017-2023 and supplemented by a second short survey collecting additional input from employees of Arctic Cooperatives in 2023. The data showed a positive correlation between the implementation of the Balanced Scorecard and employee engagement *for those employees who thoroughly understood the components and purpose of the Balanced Scorecard*. This research contributes to the scholarly literature by showing that using a Balanced Scorecard as part of a cooperative's strategic key performance indicators can improve its ability to motivate employees within the organization. Implementing the Balanced Scorecard improved employee engagement and an elevated commitment/attachment toward the organization. These findings will inform Arctic Cooperatives Limited's board and management on best practices surrounding using a Balanced Scorecard and its impacts on employee engagement.

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Introduction

Arctic Cooperatives Limited is a second-tier cooperative that has grown from a small organization to a federation with an annual revenue of more than \$300 million. The cooperative currently has operations in six provinces and territories in Canada. During the federation's first fifty years, its success was measured almost exclusively through traditional financial metrics such as revenue, expenses, and net savings. In 2018, Arctic Cooperatives contacted Daniel Côté, a professor of management at HEC Montréal. Côté presented to senior management, Arctic Cooperatives Limited board members, and other cooperatives as part of a two-day executive education course through Saint Mary's University. This class, hosted in Arctic Cooperatives Limited's home office, was open to all interested cooperative participants. It successfully attracted more than a dozen cooperative entities worldwide in January 2018. During that seminar, Côté (2019) outlined his cooperative equilibrium model, which calls for cooperatives to actively balance the associational side of the organization with the enterprise side of the business. From those learnings, Arctic Cooperatives Limited's leadership decided to change how its organizational success is measured and, following Côté's teachings, developed and implemented a Balanced Scorecard model. This tool helps "balance the decision process to align the organization with its mission and strategy" (Côté, 2019, p. 250).

It has been six years since Arctic Cooperatives implemented its Balanced Scorecard, and the question has arisen as to whether its implementation has affected employee motivation and engagement. This research topic needs to be explored using a blend of evidence-based management and exploratory research. The research focuses on one organization, Arctic Cooperatives Limited, from 2017-2023, a timeframe that spans the period before (2017) and after (2018-2022) the Balanced Scorecard was introduced. Arctic Cooperatives Limited has some practical questions about employee engagement and its relationship, or lack thereof, to using a Balanced Scorecard that, if answered, would serve as critical guidance for its future strategic plans. This research investigation would also be essential to offer specific advice to Arctic Cooperatives on what elements of its strategy are effective and what could need revision and renewal.

The research questions this project explores, then, are:

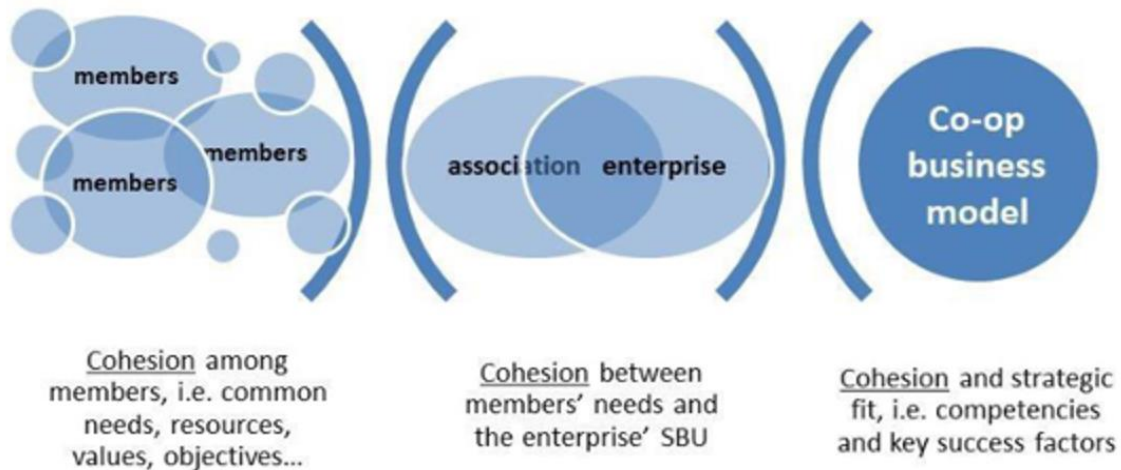
- 1) *Is there a relationship between Arctic Cooperatives Balanced Scorecard implementation in 2018 and overall employee engagement?*
- 2) *Based on the findings, what are the future recommendations for Arctic Cooperatives Balanced Scorecard efforts?*

There is value in exploring these questions as there is a missing element in the current research. As the literature review will demonstrate, using a Balanced Scorecard is well-established to increase financial success in cooperatives and non-cooperative business entities (Kaplan & Norton, 1996; Dhamayantie, 2018; Côté, 2019). However, there is a gap in the literature as most do not directly address whether implementing a Balanced Scorecard also influences the organization's overall employee engagement or commitment toward the organization. This research is also significant as it will expand the general knowledge of what does and does not motivate employees of cooperatives. In addition, most research discussed is specific to corporations. This research will determine whether a Balanced Scorecard is also potentially practical as a motivational tool within the context of a medium-sized Canadian cooperative. Finally, this research project is exploratory, assessing and investigating an organizational initiative's impact spanning the six years over which the scorecard has been in use.

Literature Review and Application to Research Topic

The literature review spans two broad themes, scorecard scholarship and engagement research. Firstly, using a Balanced Scorecard to measure the success of an organization is reviewed. Kaplan and Norton (1996) suggest separating an organization's goals and objectives into four categories: financial, internal business processes, learning and growth, and customer measurement. By focusing on measurements outside of just financial results, Kaplan and Norton (1996) highlight that "the measures on a balanced scorecard [can be] used by executives in a different way - to articulate the strategy of the business" (p. 56). Building on the work of Kaplan and Norton, Côté (2019) applies the Balanced Scorecard to the cooperative model. He bases his conceptual framework on two overarching concepts, the existence of cooperative duality and the need for a cooperative to constantly manage its cooperative equilibrium. Cooperative duality, shown in Figure 1, is a recognition of the uniqueness of the cooperative model where there are pressures from traditional management training ("enterprise needs") that compete with the membership's needs ("associational needs"). Côté (2019) refers to this as the "association-enterprise duality" (p. 46).

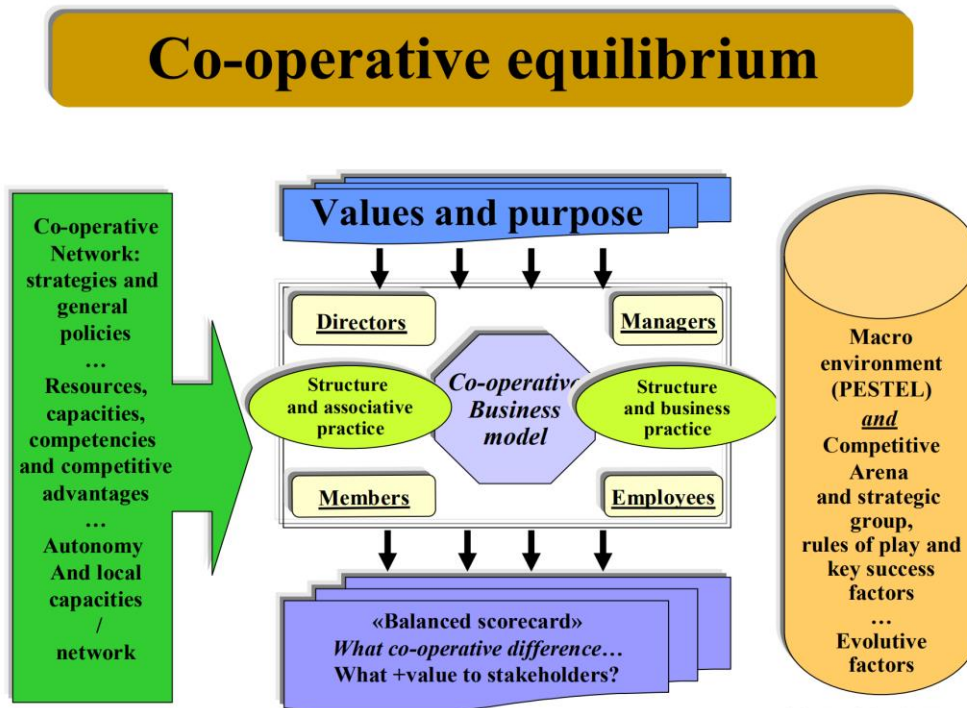
Figure 1: Côté's Cooperative Duality



From *Cooperative Management-An Effective Model Adapted to Future Challenges* (p.47), by D. Côté, 2019, JFD Inc. Copyright 2019.

To manage the tension of duality, Côté suggests a formal structured approach to managing the enterprise and associative parts of the business, which he expresses through the cooperative equilibrium model in Figure 2. The cooperative equilibrium model is a framework that essentially recognizes constantly competing factors at play within a cooperative. To be successful, there must be ongoing management to maintain a harmonious equilibrium or balance within the organization. A modified Balanced Scorecard is the best practice Côté recommended to achieve this balance. Côté (2019) suggests that “the scorecard is a social auditing tool. It is intended to be a symbolic representation of how well... coop measures up to its mission” (p. 187). Like Kaplan and Norton, Côté (2019) suggests separating a cooperative’s goals into four sections; however, he replaces the customer category recommended by Kaplan and Norton with measurements related to cooperative membership (p. 253). It was Côté’s conceptual framework and version of a cooperative Balanced Scorecard that the management of Arctic Cooperatives Limited used when it developed and implemented its Balanced Scorecard in 2018.

Figure 2: Côté’s cooperative equilibrium model



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From Cooperative Management-An Effective Model Adapted to Future Challenges (p. 50), by D. Côté, 2019, JFD Inc. Copyright 2019.

Balanced scorecard

Kaplan and Norton (1996) and Dhamayantie (2018) find that a Balanced Scorecard effectively measures and influences an organization’s overall performance and strategy. One of the significant differences between the two studies is that Dhamayantie advocates for Balanced Scorecards to be explicitly used to measure and improve the organization’s focus on cooperative principles. In contrast, Kaplan and Norton do not mention the cooperative model. However, they imply that it would be effective in any organization to “communicate the strategy of the business and to help align individual, organizational, and cross-departmental initiatives to achieve a common goal” (Kaplan & Norton, 1996, p. 56).

Regarding the first research question about the relationship between implementing a scorecard and employee engagement, Kaplan and Norton (1996) suggest employee satisfaction and training are effective measures of success within a successful Balanced Scorecard’s learning and growth portion of the measurement tool. Arctic Cooperatives

Limited's Balanced Scorecard can be compared to this standard to ensure the design and implementation meet the best practice standards suggested by Kaplan and Norton. Kaplan and Norton (1996) and Calderón Molina et al. (2014) also have suggestions on how best to implement a Balanced Scorecard to ensure its success. Those best practices can also be compared to how Arctic Cooperatives implemented Balanced Scorecards in 2018. One of the areas not discussed by Kaplan and Norton (1996), Dhamayantie (2018), or Côté (2019), however, is whether implementing a Balanced Scorecard would directly influence or motivate cooperative employees. My research explores this gap.

While the previous authors do not address whether implementing a Balanced Scorecard would influence employee motivation, a study from Cignitas et al. (2022) explored a line of inquiry similar to my research question. They sought to see "whether there is a quasi-experimentally demonstrable relationship between Balanced Scorecard (BSC) and employee well-being" (p. 103). An extensive meta-analysis involving over a hundred separate studies concluded that there is indeed a strong relationship between employee happiness and a general increase in the performance of organizations and that the Balanced Scorecard application broadly supports employee happiness. The study thus concluded that "the reviewed empirical studies have found out there is a positive impact of BSC on employee well-being" (Cignitas et al., 2022, p.105).

Calderón Molina et al.'s (2014) research was also conclusive that a Balanced Scorecard, implemented effectively, directly impacts employee commitment and overall job satisfaction. While coming to a similar conclusion as Cignitas et al. (2022), Calderón Molina et al.'s study differed in that it focused extensively on the process of implementing a Balanced Scorecard and concluded that this process significantly impacted the tool's effectiveness in increasing job satisfaction. Drawing on employee surveys from the retail sector before and after the Balanced Scorecard's implementation over two years, Calderón Molina et al. (2014) found that "the results of our study demonstrate that an appropriate implementation of the BSC ... fosters an improvement of the employees' commitment, organizational climate, job satisfaction, satisfaction with supervision and job dedication" (p. 1001).

Engagement Research

The second broad theme that explored in this literature review is the area of engagement research. Desmidt (2016), Anaza and Rutherford (2012), and Basterretxea and Story (2018) as well as Vlachos et al. (2013) and Skudiene and Auruskeviciene (2010) all explore the relationship between an organization's purpose (Mission) and how that purpose relates to how employees feel about the organization. The focus of the five articles is slightly different, with Desmidt (2016) focusing on the written stated purpose of the organization through mission statements. Anaza and Rutherford (2012) focus on the ownership model and its potential effects on engagement, while Basterretxea and Story (2018) focus on the influence of customer identification with various stakeholders and how those associations can be used as a predictor of job engagement. Vlachos et al. (2013) and Skudiene and Auruskeviciene (2010) specifically focus on an organization's use of Corporate Social Responsibility (CSR) and its effects on job satisfaction and employee motivation. All authors express similar hypotheses that employee engagement or motivation levels could be influenced positively if the organization's purpose is defined successfully.

However, the research findings were mixed. On the positively correlated side, Desmidt's (2016) research finds that an organization's purpose communicated through a powerful mission statement is associated with increased employee motivation. Vlachos et al.'s (2013) study hypothesizes that people are more intrinsically motivated if they feel that their work is important, and that internal Corporate Social Responsibility positively correlates with internal employee motivation. Their research concludes that "the findings suggest that internal and external CSR activities positively correlate with internal employee motivation" (Vlachos et al., 2013, p. 62). The authors also suggest that employees care about social responsibility actions because they enjoy sharing the same socially conscious values with their company. They go on to state this is "important for most people because according to social identity theory, working for a socially responsible company strengthens [an] employee's self-image, helps to identify themselves with the certain group[s] and in such a way to fulfill the[ir] need for belonging and membership" (p. 54). Finally, on the positively correlated side, Skudiene and Auruskeviciene's (2010) research findings state: "as predicted by H4, job satisfaction positively relates to employee CSR-induced intrinsic attributions" (p. 582). They go on to say that "fairness theory suggests that employee attitudes can be influenced by the extent to which employees consider their employing organization's actions (e.g., CSR actions) to be fair" (p. 580).

Anaza and Rutherford (2012) report that their empirical analysis does not support their hypothesized (positive) relationship between organizational purpose and employee engagement. Basterretxea and Story's (2018) research also hypothesized a positive correlation between the cooperative ownership model and employee/owners' willingness to expend more discretionary effort for the organization's success. Their results did not fully support that hypothesis, with one organization seeing a positive correlation and the other seeing a negative one. They noted, "in both cases, we find some positive responses to employee ownership running alongside negative scores" (p. 315).

The literature review around the engagement theme shows that scholarly research results both support and disprove similar hypotheses around employee engagement and motivation, indicating that external environmental factors may significantly influence how the surveyed employees feel and engage with the measured content. The arguments from authors such as Basterretxea and Story (2018) that employees generally have higher or lower expectations, which could lead to lower engagement scores, appear to have substance and need to be considered when reviewing Arctic Cooperatives Limited's research. Skudiene and Auruskeviciene (2010) also warn of potential limitations to this research in that CSR-induced attributions and job satisfaction refer to an individual's deeply held beliefs. Sometimes those beliefs are not well understood even by the respondents themselves. This limitation will also be at play while reviewing Arctic Cooperatives research.

Some environmental factors discussed during the literature review that will likely affect my research are organizational structure, organizational culture, the industry Arctic Cooperatives operates in, and communication and scorecard implementation practices. All have material impacts on the success or outcomes of engagement activities. However, it is essential to note that no Canadian cooperatives were researched during this literature review. The context of operating a medium-sized Canadian cooperative during a tumultuous period of history, given three years of a worldwide pandemic, is expected to play a significant role in the results of this research project.

Conceptual Framework for Research

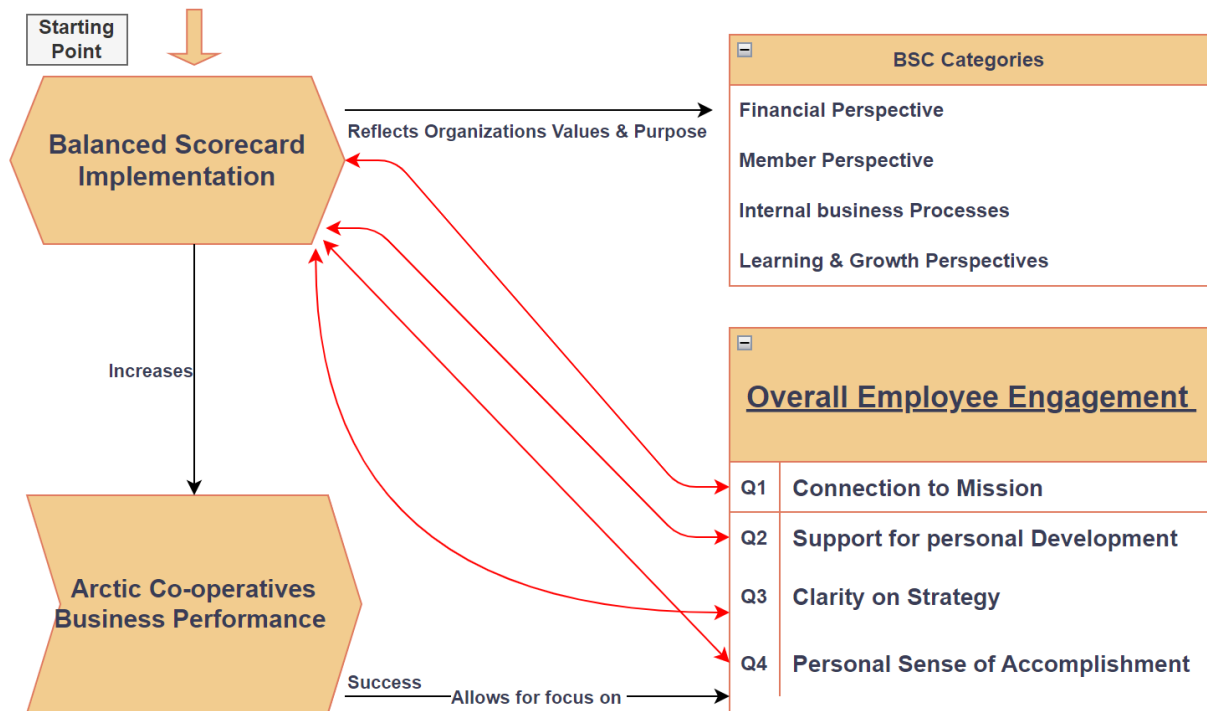
Bringing the multiple theories together leads to the conceptual framework and the lens through which this research was explored and conducted. I accept that Côté's (2019) cooperative duality and cooperative equilibrium apply to Arctic Cooperatives. A Balanced Scorecard modelled after Côté's recommendations was created and implemented to manage the associative side of the cooperative business. A Balanced Scorecard's effectiveness in improving organizational performance is well established, and so this aspect of the conceptual framework is also accepted as a proven reality (Côté, 2019; Kaplan & Norton, 1996; Dhamayantie, 2018; Cignitas et al., 2022). This increased performance and alignment of values allow employees to feel more connected to the cooperative's mission (Desmidt, 2016). Employees appreciate the support opportunities for continued professional development the Balanced Scorecard model ensures, and employees achieve greater clarity on the organization's strategy (Cignitas et al., 2022). As employees see their contributions' impacts, they feel a greater sense of personal accomplishment combining to achieve a high overall sense of employee engagement (Cignitas et al., 2022; Skudiene & Auruskeviciene, 2010). For this conceptual framework, Cignitas et al.'s (2022) definition of engagement is used: *"Employee engagement ... has been defined by researchers as greater work calling, organizational commitment, and low employee turnover, in association with employees' positive perception over the meaning and personal development they gain through work"* (p. 103).

There are significant direct and indirect effects that a Balanced Scorecard's implementation has on an organization. This research focuses on measuring greater work calling, organizational commitment and positive perception aspects of this employee engagement definition. While a good data point for measuring employee engagement, employee turnover rates are considered out of this project's scope.

A well-established direct effect of using a Balanced Scorecard is the increased business performance of the organization that allows it to pursue meaningful re-investment into the organization. Nearly all authors supported this direct effect during the literature review. So, I consider it a reality in this paper, and do not further explore its validity. However, this framework's indirect effects are of great interest and represent the main areas I desired to explore. The heightened financial capacity of the organization allows it to pursue actions that reflect the values and purpose the organization wishes to convey to its members and its internal stakeholders. I believe there is a potential link between the pursuit of an organization's values and purpose and employees' overall engagement and

motivation to work for such an organization. This exploratory research tests the proposed conceptual framework's validity. It seeks to explore, validate, or disprove the indirect expected connections between the implemented Balanced Scorecard and four main factors of employee engagement. These four factors represented as Q1-Q4 are in no specific order of importance, but they are expected to correlate directly with overall employee engagement. Q1 represents employees' sense of connection to the mission. Q2 represents employees' feelings of clarity around the organization's strategy. Q3 represents employees' feelings of being supported through personal development. Q4 represents the personal sense of accomplishment that employees feel. Figure 3 is a visual representation of the conceptual framework of this study linking together the various theories of Balanced Scorecard and Employee Engagement.

Figure 3: Framework of Study



Conceptual Framework of Research

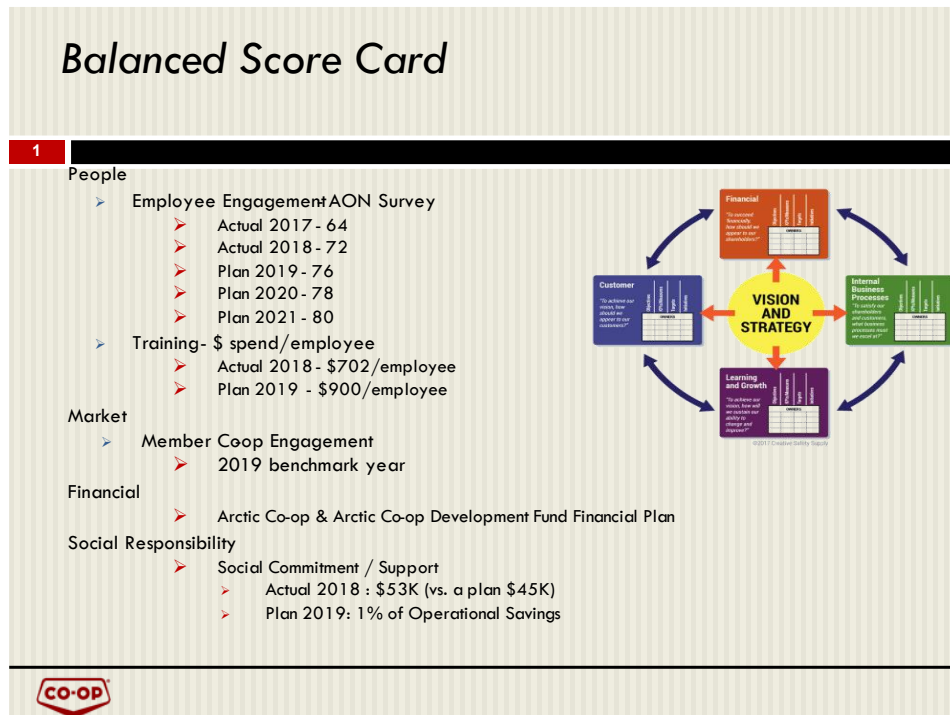
Balanced Scorecard Best Practices for Implementation

Kaplan and Norton (1996) and Calderón Molina et al. (2014) clearly state that how an organization approaches implementing its Balanced Scorecard is nearly as important as what the tool measures. Kaplan and Norton (1996) suggest correctly implementing the Balanced Scorecard tool should include undertaking the following seven specific steps during the first 12 months of the change.

- (1) Clarify board commitment and vision.
- (2) Communicate corporate BSC to middle managers.
- (3) Develop business unit scorecards.
- (4) Eliminate non-strategic investments and launch corporate change programs.
- (5) Communicate the BSC to the entire company.
- (6) Establish individual performance objectives.
- (7) Conduct monthly and quarterly reviews.

Calderón Molina et al.'s (2014) case study of a retail organization implementing a new Balanced Scorecard appears to have followed Kaplan and Norton's implementation plan very closely. This could be a factor in why the organization saw such success in relating its BSC efforts with an increase in job satisfaction and commitment. A review of the historical records of Arctic Cooperatives Limited showed its Balanced Scorecard implementation only achieved four of the seven recommended action items from Kaplan and Norton's work. The three recommendations that were missing in the Arctic Cooperatives case were "Develop business unit scorecards"; "Eliminate non-strategic investments and launch corporate change programs"; as well as "Establish individual performance objectives." What effects these omissions have on the research question's overall results will be discussed later in this paper. An example of Arctic Cooperatives Ltd Balanced Scorecard used in 2018 can be found below in Figure 4.

Figure 4: Arctic Cooperatives Limited Balanced Score Card circa 2018.



Methodology

This research was focused on the organizational level of Arctic Cooperatives Limited within a specific moment (2017-2023). The research started with an analysis of the year before the Balanced Scorecard change occurred and reviewed six years after the Balanced Scorecard was implemented. The literature review was focused on peer-reviewed journals and scholarly works dealing with broad concepts such as Balanced Scorecard research, employee engagement research, and best practices for BSC implementation. These general concepts helped determine what circumstances lead to changes in employee engagement and what causes employees to put additional discretionary effort into their work. Then, a deep dive analysis of survey results was completed.

To clarify this research methodology, I will define my use of various terms that are reused throughout the research. I often refer to both primary and secondary data. Primary data represents survey information collected for the specific purpose and intention of conducting this research. Conversely, secondary data represents survey information conducted by other reputable sources but originally for purposes unrelated to this research question. This "secondary" data is being used and interpreted to find information related to the explored research question, but the author did not influence its creation or distribution. When I refer to "quantitative data" in this research, I am referring to survey information that is measured and expressed inherently through numerical representation, such as the percentage of those surveyed that viewed a statement favourably. When I refer to qualitative data, I am

referring to statement-based responses from participants, which then are analyzed and whose meaning is interpreted and compiled. All primary (questions created by the author) qualitative data (statements from the participants) are fill-in-the-blank questions posed to employees. Some of the literature reviewed utilized custom surveys (Desmidt, 2016; see also Anaza & Rutherford, 2012), while others analyzed existing internal data that was initially collected for purposes independent of the specific research being explored (Basterretxea & Story, 2018). This research utilizes both methods.

This research has extensive access to existing secondary data, with over seven years of quantitative secondary data available for the project. However, a smaller primary survey was also conducted to complement that data and give it deeper context and meaning in relation to the researcher's conceptual framework. This primary quantitative and qualitative survey comprised five questions embedded in the Kincentric engagement survey given to all Arctic Cooperative staff in May 2023. The primary survey was administered through the same third party that collected the previous secondary data, Kincentric Canada. The survey questions were submitted to Kincentric Canada, and they compiled the results. The primary and secondary data for the years 2017-2023 had an employee participation rate of over 90% for every year reviewed, and so is highly representative of the organization's entire workforce during the specific time explored.

These data results were obtained digitally for six of the seven years reviewed, with the missing year manually inputted for comparative purposes. The secondary data set for six of the seven years examined also had qualitative data that has been analyzed to provide non-numerical data and context for the results. However, after reviewing all seven years of qualitative data, there were no employee responses or statements outside the primary survey relating to the research question being explored. Every year of secondary engagement data, there were between 70 and 120 individual questions totalling an entire database of nearly seven hundred questions. As the research explored attempts to connect changes related to the Balanced Scorecard implementation over time, the approach was to narrow the secondary data set to five questions that remained unchanged throughout the explored period. This limited the secondary dataset to thirty-five individual questions (five per year).

The 2023 primary survey included unfiltered employee comments directly related to the research topic to give detail and context to the extensive secondary data already collected. The analytical tools for the quantitative data used for the research are descriptive, such as using frequency measures, comparative analysis, and line graphs to demonstrate trends. I also sought to demonstrate interdependences between two variables, such as strategic direction and engagement levels. These data sets have been combined with the primary qualitative text data to complete hypothesis testing to reach a conclusion to the research questions.

Secondary Data Analysis and Results

To answer the research question, previously completed Arctic Cooperatives Limited employee engagement surveys from 2017-2023 were reviewed. As a baseline, data from 2017 was collected as it represented the state of the organization before the Balanced Scorecard was implemented. The surveys are a robust representation of the entire workforce at Arctic Cooperatives Limited. Participation was extremely high throughout the period, with between 97 and 117 employees completing the survey yearly. The scoring for all survey questions reviewed was a standard six-point Likert scale ranging from Strongly Agreeing to Strongly Disagreeing with the stated question. The data below presents the results regarding the percentage of employees who answered favourably to the statement, which means the proportion of employees who responded strongly agree or agree with the statement. Those who answered slightly agree, slightly disagree, disagree and strongly disagree with the statement were considered unfavourable for this research.

Table 1: Survey Data for Arctic Cooperatives Ltd for 2017-2023 shows employees’ positive perception scores in factors the conceptual framework links to engagement.

Arctic Cooperatives Limited	2017	2018	2019	2020	2021	2022	2023
Mission	N/A	79	83	85	65	73	79
Strategy	60	74	69	74	63	67	68
People	79	74	82	84	82	86	90
Sense of Accomplishment	77	79	82	85	74	77	82
Overall Engagement	64	72	83	79	67	69	67

The first survey question that was explored involved the organization’s overall mission and how employees felt about its ability to provide meaningful direction to the individual. The survey question itself is labelled as “mission” in the tables and line graphs. The question asked throughout all available years of employee surveys was, please respond to the following statement: “This organization’s mission provides meaningful direction to me.” Baseline information for 2017 was not available for this question as the question was newly introduced in the 2018 Kincentric survey. However, between 2018 and 2020, the response to this question rose by six points and then dropped 14 points from the 2018 baseline in 2021 (65) and remained six points below baseline 2018 numbers in 2022 (73) and matched 2018 baseline numbers in 2023.

The second survey question explored whether the organization’s senior leadership provides clear strategic direction to employees. The survey question itself is labelled as “Strategy” in the tables and line graphs. The question that was asked was, please respond to the following statement: “Senior Leaders provide clear direction for the future.” Baseline information for 2017 was available for this question, with an initial favourable score of 60. Between 2018-2020 there was an increase in this category of 14 points in 2018, 9 points in 2019, and 25 points from the baseline in 2020. However, similar to the mission question, the overall score dropped significantly in 2021 and 2022 and 2023, representing a much smaller increase over baseline 2017 data of 3 points, 7 points and 8 points, respectively.

Figure 5: Mission and Strategy: Percentage of Favourable Responses, 2017-2023



The third survey question explored employees’ perspectives on the organization’s learning and development support, a vital component of the new Balanced Scorecard. The survey question is labelled as “People” in the table and graphs. The question asked was, please respond to the following statement: “This organization strongly

supports the learning and development of its employees.” Baseline information was available for this question, with 2017 data at 79% favourable. However, after the Balanced Scorecard was implemented in 2018, the score dropped 5 points from the 2017 baseline before it eventually increased by 3 points from the baseline in 2019 and 5 points from the baseline in 2020. Unlike the other data points presented, the “people” category did not significantly decline in 2021, 2022 and 2023, respectively, still representing an increase over the 2017 baseline of 3 points in 2021, 7 points in 2022, and 11 points in 2023.

The fourth survey question reviewed employees’ feelings of accomplishment, another vital consideration for employee motivation and engagement. The survey question itself was labelled as “sense of accomplishment” in the tables and line graphs. The question asked, please respond to the following statement: “I get a sense of accomplishment from my work.” Baseline information from 2017 was available for this question, with a favourable response rate of 77. In subsequent years, after the Balanced Scorecard was implemented, “sense of accomplishment” increased from the baseline by 2 points in 2018, 5 points in 2019, and 7 points in 2020. Like most of the other survey questions, a decline from the baseline was experienced in 2021 of 3 points and 0 points in 2022 before this category showed an improvement from the 2017 baseline of 5 points in 2023.

Figure 6: People and Sense of Accomplishment: Percentage of Favourable Responses, 2017-2023

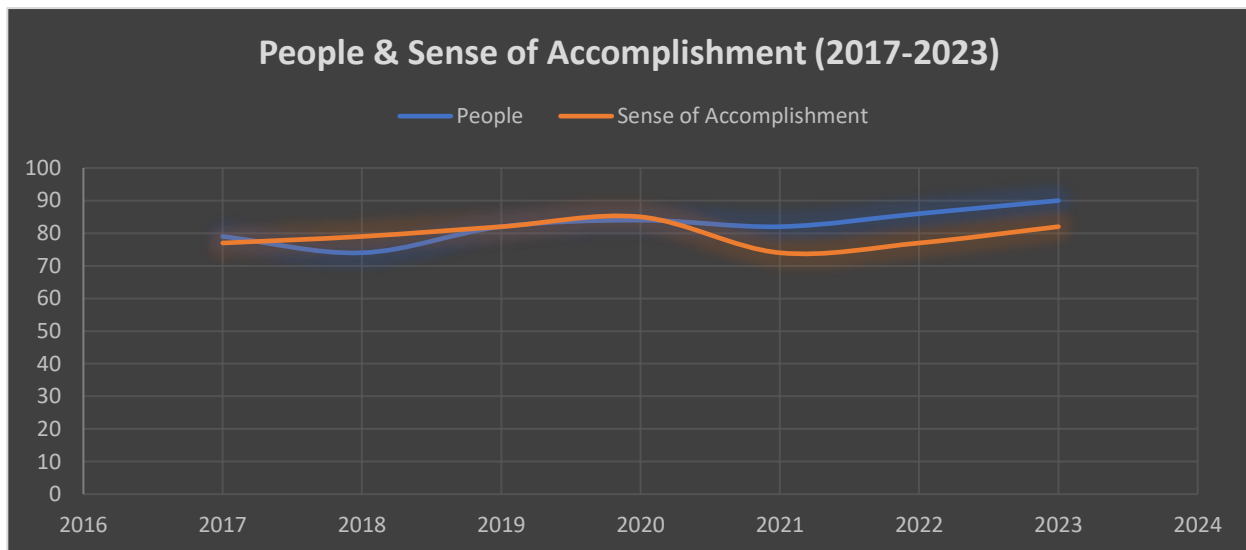


Table 2: Secondary data intercorrelation between factors and overall employee engagement

	Mission	Strategy	People	Sense of Accomplishment	Overall Engagement
Mission	1				
Strategy	0.800994035	1			
People	0.073565779	0.211045305	1		
Sense of Accomplishment	0.88732829	0.730459086	0.120133663	1	
Overall Engagement	0.919146453	0.604996994	0.179532179	0.84486238	1

Testing the correlation between the four variables (Q1-Q4) and overall engagement using the Pearson correlation method demonstrates that all measured variables show at least some positive correlation to overall employee engagement, as hypothesized in the researchers’ conceptual framework. Both connection to mission and personal

sense of accomplishment variables show a robust correlation to overall engagement at 0.91R and 0.88R, respectively. Clarity on strategy is also considered strongly correlated with a correlation of 0.60R. Support for personal development under the people category showed the weakest correlation of all the data reviewed and is considered very weakly correlated under the Pearson method coming in with a value of 0.179R. Taken as a whole, all anticipated variables showed some level of positive correlation to overall employee engagement. This research sample thus adequately supports the four expected engagement influencers. Support for personal development, anticipated to be a material factor in this research's conceptual framework, also positively correlates to employees' overall engagement. However, it is weaker than initially predicted based on the secondary data reviewed.

The data has demonstrated a strong correlation between three of the four factors that the conceptual framework expected to influence overall engagement. The three factors that demonstrated a strong correlation to engagement also showed an improvement over the 2017 baseline data between 2018-2020, corresponding with the implementation of the Balanced Scorecard. Although the same three factors experienced declines in the subsequent years 2021-2023, major external factors, such as the worldwide pandemic, are suspected of having played a significant role in the outcomes of those data points as employees had previously completed their engagement survey in March of 2020. So the effects of the worldwide coronavirus pandemic did not appear in the data until the 2021 engagement data set. The survey data results from 2021 to 2023 would have fully captured the reality of coronavirus, and that substantially influenced the results. Thus, there seems to be evidence of a positive relationship between implementing a Balanced Scorecard and the subsequent increase in employee perception in three of the four hypothesized factors influencing overall employee engagement.

Primary Survey Data Analysis

The primary survey was conducted in May 2023 and was administered by Kincentric Canada from questions provided by me and vetted by the project's supervisor (see Appendix for the full survey). It was offered to all Arctic Cooperatives Limited full-time staff with more than three months of service. It comprised five questions, with two multiple-choice questions and three fill-in-the-blank questions. There was no introduction or leading statements before the commencement of the survey, and no one within the organization was aware that there would be questions related to Arctic Cooperatives Limited's Balanced Scorecard implementation on the annual engagement survey for 2023.

Employee understanding of what the Balanced Scorecard is within the organization

The first question in the primary survey was designed to test the current knowledge base of employees by asking them to describe in their own words what they know about Arctic Cooperatives Balanced Scorecard. Of the 116 employees surveyed, 24 didn't answer or declined to respond. I have assumed that those who didn't respond didn't do so due to a lack of knowledge of the tool. Next, 28 employees responded to the question but were either incorrect or wrote that they didn't understand it well enough to articulate its components or purpose. A further total of 64 employees were able to respond accurately with relevant information on Arctic Cooperatives' Balanced Scorecard and demonstrated knowledge of its components, its purpose or both. This question demonstrated that 55% of those surveyed within the organization had a sufficiently in-depth understanding of the Balanced Scorecard tool to describe it accurately. A 2015 achievers survey showed that, on average, only 39% of employees know their organization's mission statement. Arctic Cooperatives employees' knowledge base of 55% having in-depth knowledge of a component of its strategy is impressive. It establishes that its existence could be related to employees' feelings of commitment and engagement for those familiar with it. It also means that its potential impact is limited to those who understand the Balanced Scorecard and that the commitment or engagement of 45% of the staff within Arctic Cooperatives Limited could not be influenced by the Balanced Scorecard due to their lack of knowledge of it.

Balanced Scorecard Impact on day-to-day work

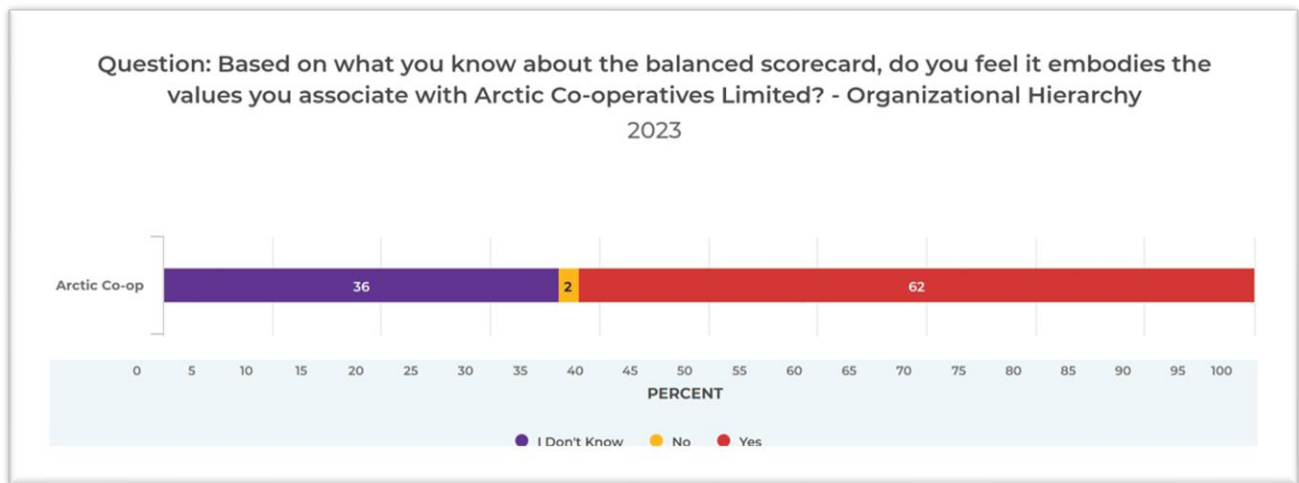
The second question was designed to determine whether employees felt implementing a Balanced Scorecard directly impacted their day-to-day work. Out of the 116 employees surveyed, seven didn't answer. Like the first question, I assumed the employees couldn't answer due to a knowledge gap, representing 6% of those given the survey. Next, 32 employees agreed with the statement that they "don't know how it affects my work," representing

27.6% of those given the survey. Eight individuals responded that the Balanced Scorecard has “no effect on what I do,” representing 6.9% of those given the survey. Thirty-seven employees responded that the Balanced Scorecard “affects some of the things I do,” denoting 31.9% of those given the survey. And lastly, 32 employees answered that they believe the Balanced Scorecard “affects everything I do,” representing 27.6% of those given the survey. Combining the responses of those who answered that the Balanced Scorecard impacts some things or everything that the employees do, provides a total of 59.5% of employees at Arctic Cooperatives who believe the organization’s implementation of a Balanced Scorecard impacts their day-to-day work. This response is similar to the total number of employees demonstrating active knowledge of the Balance Scorecard and establishes a linkage between the Balanced Scorecard and employee behaviour. These results also support the conceptual framework that an indirect link exists between the Balanced Scorecard implementation and the hypothesized factors that drive overall employee engagement.

Is the Balanced Scorecard a proxy that represents the values of Arctic Cooperatives Limited?

The last multiple-choice question on the primary survey tested the conceptual framework and hypothesized that employees view the Balanced Scorecard as a proxy for the organization’s values and purpose. The question asked whether employees feel the Balanced Scorecard embodies the values they associate with Arctic Cooperatives Limited. The results shown in Figure 8 demonstrate that 62% of the staff body of Arctic Cooperatives agreed that the Balanced Scorecard reflects the organization’s values. These results support and validate the conceptual framework’s hypothesis that the Balanced Scorecard tool serves as a proxy in representing the cooperatives’ organizational values from the perspective of the organization’s employee base.

Figure 7: Values Question: Percentage Breakdown of Responses, 2023



Qualitative Insights linking Balanced Scorecard to Q1-Q4

Part of the conceptual framework hypothesized an indirect linkage between the Balanced Scorecard implementation and four factors expected to impact overall employee engagement. The four factors’ correlation to overall engagement was tested using seven years of secondary data, and it was shown that three of the four factors Q1, Q3 and Q4, were strongly correlated, with Q2 being weakly correlated. In addition, when reviewing the qualitative insights from the 2023 Kincentric primary survey, employee comments were explored to see if their raw comments either supported or did not support the indirect linkages theory in the conceptual framework.

Q1: Represents employees’ connection to the mission. During the 2023 primary survey, employees openly expressed their thoughts that there is a connection between the Balanced Scorecard and the organization’s mission, with the words “Mission or Vision” being mentioned over a dozen times within the employee comments. Some described the Balanced Scorecard as “translating the general mission/vision of the company”. At the same time, other employees stated that the Balanced Scorecard “embodies the mission and vision of the organization and drives

all initiatives". While only limited value can be given to a small set of individual comments, the comments further support the hypothesis that the Balanced Scorecard tool enhances employees' feelings of connection to the organization's mission and vision.

Q2: Represents the Balanced Scorecard's support for personal development and its potential effects to improve overall employee engagement. In the primary survey open-ended question, the words "Learning/Training/Development" were mentioned twenty-eight separate times, by far the most commented-on attribute of the Balanced Scorecard that participants of the survey noted. It is evident within the comments that support for personal development is very important to employees. Some employees' comments are very straightforward in linking the Balanced Scorecard category of personal development and their overall employee engagement levels. For example, one comment from the primary survey stated, "I provide my satisfaction rating each year, which contributes to the people's Kincentric Rating. I am in training, which means the training dollars are reported as being spent on my training. Delegate satisfaction is based on the work I do for our Co-op and delegates. Donations that I contribute are matched in some of the great causes we support". Another comment highlights the employee's feeling of satisfaction in knowing that the Balanced Scorecard ensured the cooperative focuses on non-financial items such as personal development when they stated its "comforting that the organization values more than just the bottom line and focuses on training of employees". Based on the responses, it is clear that employees view personal development as indirectly linked to the Balanced Scorecard's implementation.

Q3: Represents employees' feelings of clarity around the organization's strategy and its potential effects to improve overall employee engagement. In the primary survey, open-ended questions, "Strategy or Strategic," were mentioned fourteen times in employees' responses when asked to discuss what they know about the Balanced Scorecard. One employee who identified in the comments as a non-manager was particularly enlightening as they described the organization's strategic link to the Balanced Scorecard and highlighted a desire to see further changes made. The employee commented, "balanced scorecard is a great tool to manage and evaluate our strategic initiatives and goals. From the staff meeting, I know that the senior leaders have clear goals and strategies to achieve them, which is great. However, I don't think there are enough specific measurements to evaluate the success of each goal. Although, as an employee, I also want to contribute to achieve those goals, I haven't had a guide or clear communication from leaders on how my work contributes to them". Comments from employees such as the one above highlight that some see the Balanced Scorecard as a means to provide clarity around the organization's strategy, and these actions are meaningful to employees. While individual comments are limited in their ability to generalize, the primary survey is supportive that there is an indirect link between the Balanced Scorecard and how employees view clarity around the cooperative's organizational strategy.

Q4: Represents the personal sense of accomplishment that employees feel and whether implementing a Balanced Scorecard affects that feeling of accomplishment. The words accomplishment or satisfaction only appeared in the open-ended comments four times; however, some comments supported the concept that the Balanced Scorecard led to a greater sense of personal accomplishment. For example, one described the Balanced Scorecard as "meeting business and personal needs equally". At the same time, another commenter stated that "we work together to improve our social and economic well-being, we work together in honesty, openness and social responsibility. All things I personally agree with". While the evidence is not overwhelming for Q4, employee comments support an indirect linkage between the Balanced Scorecard and a personal sense of accomplishment.

The Emergence of Covid-19 and its Effects on Employee Morale

One of the realities of reviewing data over a prolonged period of time is that world events and irregularities can occur during the reporting period. This was the case with this research on employee engagement within Arctic Cooperatives Limited. In March 2020, the world was faced with a once-in-a-generation worldwide pandemic. As noted by Nahar and Thakur (2022), "the COVID-19 outbreak, which had no apparent immediate solution, threw workers and management into turmoil and panic" (p. 9). Employees of Arctic Cooperatives Limited experienced this turmoil similarly to the rest of the world. The 2020 data compiled for this research was not affected by Covid-19 due to timing. All employees had already completed the survey in 2020, well before the threat and reality of Covid-19 became widespread in Canada. However, the 2021-2023 results took place under the total influence of those

circumstances, and this reality needs to be considered when interpreting those years' data. Nahar and Thakur's study on the Impact of Covid-19 on employees' morale is clear that the experience had a generally negative effect on employee morale. Nahar and Thakur (2022) conclude that "the study findings are in accordance with the results of Howe et al. (2021) and Lazim et al. (2020), who suggest that prolonged working hours and feelings of isolation may negatively hamper the morale of the employees. Also, uncertain times like pandemics often tend to create emotionally disturbing experiences resulting in a decrease in their morale and satisfaction with the firm" (p. 9). The negative impacts and stressors Covid-19 had on employees likely had a material effect on Arctic Cooperatives' employee engagement results in 2021-2023. This reality was considered when factoring in the results and conclusions of the primary and secondary data analyzed in this research.

Conclusion

This research project set out to determine whether there was a relationship between Arctic Cooperatives Balanced Scorecard being implemented in 2018 and the cooperative's employees' feelings of overall engagement. By creating a conceptual framework developed from other authors' theories, this research tested the validity of that framework to systematically determine whether indirect linkages between implementing a Balanced Scorecard and employee engagement could be found. Through the custom primary survey, it was demonstrated that employees of Arctic Cooperatives do view the Balanced Scorecard as a proxy for the organization's values. It was hypothesized within the conceptual framework that four main factors contributed indirectly to overall employee engagement and that the Balanced Scorecard implementation influenced those factors. The secondary analysis and qualitative employee comments established that the factors Q1, Q3 and Q4 all saw a strong positive correlation between themselves and overall employee engagement from the data. Q2 demonstrated a weaker positive correlation through the secondary data. Still, the qualitative employee comments strongly supported Q2. Therefore, I concluded that Q2 is still validated as an active indirect factor in overall engagement. Lastly, the conceptual framework hypothesized that implementing the Balanced Scorecard directly affected the four factors that were believed to drive overall organizational engagement. The primary survey analysis supported this assertion that there is an indirect link between the Balanced Scorecard and the four factors initially thought to affect engagement. Based on the evidence, the Balanced Scorecard correlates positively with overall employee engagement for those employees familiar with the tool. The subsequent drop in engagement seen from 2021-2023 can be primarily attributed to external circumstances brought on by the worldwide pandemic that began to affect the employee data results starting in the 2021 survey year.

Recommendations

Research question #2: What are the future recommendations for Arctic Cooperatives Balanced Scorecard efforts based on the findings?

This research project confirmed that employees of Arctic Cooperatives Limited who know and understand the Balanced Scorecard view it as an important expression of the organization's values and as a meaningful indirect motivator. The research also confirmed that the Balanced Scorecard impacts employee behaviour daily, with 59.5% of staff stating that it affects some things or everything the employees do daily. This high percentage of impact on day-to-day actions from staff suggests that the tool is relatively effective in motivating and influencing employees. It also means improvements to the Balanced Scorecard tool would likely significantly impact employees' day-to-day work. Additionally, the research demonstrated that in 2023, 55% of the staff accurately understood the Balanced Scorecard and could spontaneously demonstrate knowledge of its components, purpose or both when tested. That indicates that the previous communication strategy of the organization has been partially successful in transferring that knowledge to staff throughout the organization but that with specific recommendations to the communication strategy, there is an opportunity to impact even more employees within the cooperative. Thus, the recommendation for Arctic Cooperatives Balanced Scorecard efforts is to make minor adjustments to the tool, which has shown some effectiveness but has room for improvement. A complete revision of the communication strategy is also recommended to ensure the remaining 45% of the staff complement understand the tool sufficiently to describe its components and purpose to fellow employees effectively.

Revision of the Balanced Scorecard Tool

Based on this research, specific recommendations can be made to enhance the Balanced Scorecard tool. During the literature review, it was evident from authors such as Vlachos et al. (2013) and Skudiene and Auruskeviciene (2010) that Balanced Scorecards focused on an organization's Corporate Social Responsibility can be a compelling motivator for employees. Although Arctic Cooperatives' current Balanced Scorecard does incorporate social responsibility in the realm of donations and community impact, this area of the scorecard is recommended to be enhanced through an additional focus on the sustainability and environmentalism of the organization. The literature demonstrated that this is a powerful motivator, and its inclusion within Arctic Cooperatives' Balanced Scorecard tool would likely make it even more effective. Kaplan and Norton's (1996) and Calderón Molina et al.'s (2014) Balanced Scorecard recommendations also suggest that Arctic Cooperatives could enhance the Balanced Scorecard tool by developing department-level business unit scorecards that include personal performance objectives or goals. In the primary survey comments, some employees expressed confusion over how they could impact the Balanced Scorecard within their position. One commenter wrote, "Even though the balanced scorecard was mentioned at the staff meeting, I didn't think that my jobs are aligning a lot". Having the Balanced Scorecard key elements developed at the business unit level would make it much more apparent to employees how their efforts throughout the entire organizational structure can directly affect the outcomes intended through a Balanced Scorecard. Adding individual goals in the form of performance objectives would also ensure accountability and enhance the perceived importance of the Balanced Scorecard throughout the cooperative.

Revised Communication Strategy

Many primary survey employee comments highlighted their knowledge of the Balanced Scorecard and the organization's progress towards their goals through the staff meeting and manager meeting process. Continuing that portion of the previous communication strategy would be recommended as it appears effective. Since 45% of staff could not discuss the components and purpose of the Balanced Scorecard meaningfully, it would be recommended to incorporate it within new hire orientation models conducted through the organization's learning management software. This would ensure consistent messaging and sufficient reach as this method can track employee completion rates and generate reports to the cooperative. In addition to this change, including the Balanced Scorecard monitoring on the company's external and internal digital platforms would ensure the Balanced Scorecard information would be highly visible to employees between quarterly staff update meetings. The company's website, accessible to all stakeholders, would increase the transparency and visibility of the initiative. Internal communication tools such as Arctic Cooperatives Limited's newly created intranet would also be a recommended tool to potentially give monthly updates on organizational Balanced Scorecard goals and as a forum for employees to discuss the tool in a less formal setting.

Additionally, if the Balanced Scorecard was enhanced so that department and business unit-level scorecards were developed, they could be incorporated into monthly divisional meetings. Similarly, if employees are expected to establish individual performance objectives as part of their personal performance process, those goals would be discussed during their one-on-one conversations with their direct supervisor, which are mandated to occur within Arctic Cooperatives at least bi-weekly. Formal performance reviews are conducted every six months within Arctic Cooperatives. So that would present another opportunity for the Balanced Scorecard to be communicated and discussed bi-annually.

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Appendix

Primary Survey Questions: (administered through Kincentric Canada May 4th, 2023)



Arctic
Co-operatives
Limited

84%

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2023 Arctic Co-Op Engagement Survey

Arctic Co-operatives uses something called a Balanced Scorecard to guide its decision-making. Please share what you know about this tool.

Reflecting on what you just shared about your understanding of the balanced score card, how would you describe its impact on your day-to-day work ?

- It affects everything I do
 - It affects some of the things I do
 - It has no affect on what I do
 - I don't know how it affects my work
-

Can you elaborate on your answer by explaining how the balance score affects, or does not affect, your day-to-day work?

Based on what you know about the balanced scorecard, do you feel it embodies the values you associate with Arctic Co-operatives Limited?

Motivating Employees Using a Balanced Scorecard

- Yes
- No
- I Don't Know

Can you elaborate on your previous answer by explaining why the Balanced Scorecard either does or does not embody the values you associate with Arctic Co-operatives Limited?

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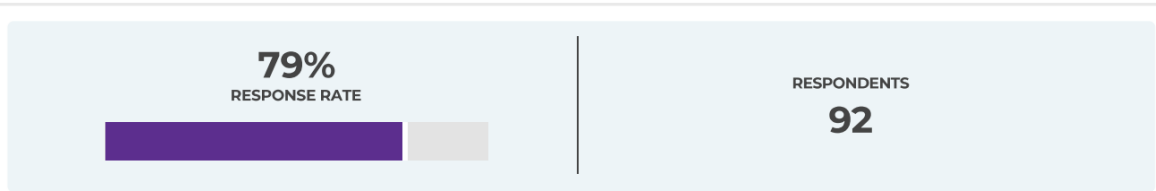
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2023 | 2022

Group | Arctic Co-op

Arctic Co-operatives uses something called a Balanced Scorecard to guide its decision-making. Please share what you know about this tool.



It is something that measures result/ performance within the organization.

This is a tools for monitoring the strategic decisions by the company in different perspective (financial, customer, bus. process & learning and growth)

it is used to identify, improve, and control a business's various functions and resulting outcomes

Used to make changes in the office environment?

This tool measures social and economic measures of the organization with a focus on key aspects such as training & staff development and social causes of the community.

i've seen it before: learned it in university and have seen application of it in my previous and current job

It is reviewed by all employees of Arctic Cooperatives Limited for better visibility of health of an organization

A performance tool used to assess an individual performance throughout the year, keeps track of their successes and areas for improvement .



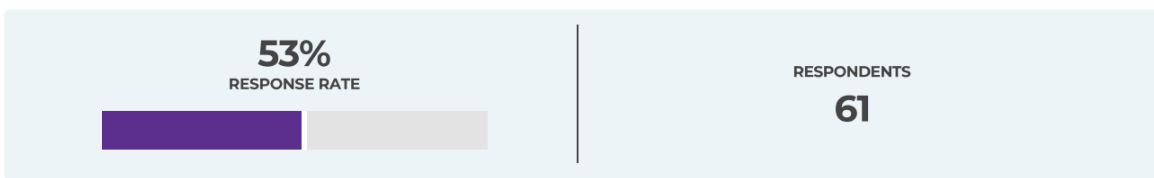
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2023 | 2022

Group | Arctic Co-op

Can you elaborate on your previous answer by explaining why the Balanced Scorecard either does or does not embody the values you associate with Arctic Co-operatives Limited?



same as above

Arctic Co-operatives promote co-operation, relationships, diversity and inclusion, accountability and service and support

We always work on to meet our goals. For our Department, it is to gain revenue. So to meet that goal, we have to perform well.

In my opinion, it embodies ACL values. By measuring the company's performance not only on financial aspect but other factors, we are associating other values such as relationship, development and accountability.

Providing an exceptional level of service to our Members is always front of mind, so I agree that it help embody my values I associate with Arctic Coop.

It aligns with our Mission, Vison and Values as an organization.

It is a focus on our investment in people, our customers, our processes

I am not familiar with it