

## Balanced Scorecard Institute Confers Award for Excellence to Healthcare Industry Organizations -- Montana Unified School Trust, and Blue Cross and Blue Shield of Alabama

*The Balanced Scorecard Institute named two healthcare industry organizations -- Montana Unified School Trust, and Blue Cross and Blue Shield of Alabama -- as winners of the 2015 Award for Excellence. The Award recognizes outstanding organizational performance in strategy management & execution due to strong commitment to strategic planning, engaged leadership, performance measurement/analysis and continuous improvement.*

The [Balanced Scorecard Institute](#) named [Montana Unified School Trust](#) and [Blue Cross Blue Shield of Alabama](#) as winners of the 2015 [Award for Excellence](#). The Award recognizes outstanding organizational performance in strategy management and execution due to strong commitment to strategic planning, engaged leadership, performance measurement/analysis and continuous improvement. Both awards were presented on May 19, 2015 at the 2015 Strategy Execution Summit being held May 19-21, 2015 at the Park Hyatt in Washington, DC. The Summit is sponsored by the Balanced Scorecard Institute & Spider Strategies.

The Award for Excellence is conferred to organizations that demonstrate breakthrough results based on performance management excellence criteria, including executive leadership, strategy development and communication clarity, organization alignment to a shared vision of the future, strategic resource allocation, performance reporting and communication, breakthrough results and sustainability. Both organizations achieved the Award for having developed and deployed a comprehensive strategic planning and management system that provides a framework for profound transformation and change.

### MONTANA UNIFIED SCHOOL TRUST

The Montana Unified School Trust (MUST), headquartered in Helena, Montana, has been providing health benefit plans to Montana public school districts employees for 28 years through a self-funded trust. The Trust has no employees. The Montana School Services Foundation (for which all of the employees work) has the contract to manage the Trust.

After a financial crisis in 2010, Mr. Eric Schindler was brought on as CEO to execute a turnaround. The Trust had just lost more than half of its groups and 60% of its members. People in the market had lost confidence in MUST, so it had to rebuild that confidence while also rebuilding the financial viability of the Trust. In 2011, MUST deployed the Nine Steps to Success™ Balanced Scorecard Strategic Management System. That system guided the MUST team to develop a plan to turn the Trust around. Since 2011-12, MUST has been reporting quarterly on the Balanced Scorecard, with annual planning sessions to refresh the plan, modify measures and identify new initiatives.

The Affordable Care Act provided MUST a one-time opportunity in 2014-15 to regrow its membership, but only after restoring trust in the market. The strategic objectives deployed and measured allowed MUST to rebuild the financial stability of the Trust, while at the same time limiting its average premium increases to 5.6%, 4.8% and 1.2% in fiscal years 2013, 2014 and 2015, respectively. All of this hard work paid off in 2015 when MUST grew the membership of the Trust by 97%.

“We could not have achieved the total turnaround success of MUST without the Balanced Scorecard system,”

said Eric Schindler, CEO of the Montana School Services Foundation, who accepted the Award for Excellence. "It allowed us to identify and report on continuous improvement that was key to our success."

#### BLUE CROSS AND BLUE SHIELD OF ALABAMA

Established in 1936, Blue Cross and Blue Shield of Alabama is a not-for-profit health insurance company with over three million members, both in Alabama and nationwide. Blue Cross provides employers, families and individuals access to quality, affordable healthcare. Blue Cross and Blue Shield of Alabama is an independent licensee of the Blue Cross and Blue Shield Association, which allows its members access to the national Blue Cross and Blue Shield System.

Blue Cross implemented the Balanced Scorecard in 2011 with the support of its executive leadership. The Balanced Scorecard has assisted Blue Cross in continuing to provide award-winning customer service resources and tools that help members with their healthcare needs, manage healthcare costs, and strategically grow in the new healthcare environment. Whether members are searching for a doctor, selecting the right plan, managing their own health or taking advantage of resources to maintain a healthy lifestyle, Blue Cross provides multiple ways to meet its customers' needs and exceed their expectations. Through the use of the Balanced Scorecard, Blue Cross has been able to rapidly adapt to the ever changing healthcare environment, while serving members, managing healthcare costs, and strategically growing in order to better serve our members.

Susan Warren, Department Manager of Corporate Strategy with Blue Cross Blue Shield of Alabama, accepted the Award for Excellence.

In announcing the winners of the Balanced Scorecard Institute's highest honor, Institute Chief Strategy Officer Gail Stout Perry recognized "the exemplary commitment and involvement of the many people of both organizations" who implemented the Balanced Scorecard Institute's unique strategic planning and management system -- Nine Steps to Success™.

"Montana Unified School Trust and Blue Cross and Blue Shield of Alabama are role models because they are committed to excellence in strategy management and execution. In addition -- and most notably -- they translated this commitment into improved performance," said Perry, co-author of [The Institute Way: Simplify Strategic Planning and Management with the Balanced Scorecard](#).

The Awards for Excellence were presented at the Balanced Scorecard Institute's premier annual conference, which attracts an international audience of practitioners of the balanced scorecard framework and Spider Strategies software, and includes government officials, not-for-profit organizations, and representatives from business and industry.

About the Balanced Scorecard Institute: The Balanced Scorecard Institute, a Strategy Management Group Company, provides strategic planning, balanced scorecard and performance measurement and management training, certification, and consulting services to government, non-profit, and commercial organizations. Services include public and on-site courses, facilitation and consulting services, and information and tools used by executives, managers and analysts to transform their organizations into "performance excellence" organizations. The Balanced Scorecard Institute's (BSI) website -- [www.balancedscorecard.org](http://www.balancedscorecard.org) -- is a leading resource for information, ideas and best practices on strategic planning and management, performance measurement, and balanced scorecard systems. BSI's Nine Steps to Success™ balanced scorecard framework integrates strategic planning, budgeting, operational planning, performance measurement and strategy execution into a disciplined framework for helping organizations achieve higher levels of performance.



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