

# Bill Barberg

4050 Olson Memorial Highway Suite No. 250  
Golden Valley, MN 55422

Phone: 763.331.8361  
Email: bill.barberg@insightformation.com

## Summary of Primary Expertise

**Strategy-Aligned Management:** Developed the concept of “Strategy-Aligned Management” as a composite of best principles, techniques and tools for improving strategic alignment, strategy execution and performance improvement. Consults and teaches on Strategic Performance Management, Strategy Maps and best practices in Balanced Scorecard design, deployment, and automation.

**Collective Impact and Collaborative Strategy Management:** A recognized leader in Collective Impact, community collaboration and large-scale strategy execution. Mr. Barberg has done groundbreaking work (working alongside Paul Epstein and the Results that Matter Team) in developing the concept of the Community Balanced Scorecard and collaborative strategy execution. This work has been featured by a growing number of organizations involved with public health and other social issues.

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## Experience & Achievements

Bill Barberg is the President and founder of Insightformation, Inc., a management and technology consulting company based in Minneapolis, MN. Mr. Barberg has consulted with over 50 different organizations and communities in engagements related to their Collective Impact or Balanced Scorecard programs.

Bill was invited to be a founding partner of the Guiding Coalition for the 100 Million Healthier Lives campaign and along with being in that role, he is an advisor to the leadership team of that new, nationwide campaign.

He has taught many conference sessions and 2-day courses for a variety of organizations, including the American College for Healthcare Executives, the Society for Healthcare Strategy and Market Development, American Strategic Management Institute, the Performance Institute, and others.

## *Examples of Some Recent Presentations, Workshops and Publications*

- 2015 Presented twice at the Jefferson Population Health Colloquium on community health improvement
- Published an article in January 2015 on “Who Gets the Credit for Collective Impact?” for GMNsight, a professional journal written for and by the members of Grants Managers Network
- 2014: Communities Joined in Action conference entitled “Unleashing the Power of Communities: Aligning Aspirations and Aspirations to Improve Health.” Presented on “Innovations to Create Communities of HOPE” and received 87.5% excellent rating by participants.
- 2014: Co-led a workshop with Bill Eggers of Deloitte on “The Solution Revolution and Collective Impact.”
- 2014 NACCHO national conference: Presented on using technology to support PHAB 1.5 accreditation
- 2014 Public Health in the Rockies: Presented workshop on using dashboard technology to enhance Collective Impact
- 2014: Puget Sound Partnership EcoNET Summit keynote address: “Winning as a Team; Collaborating to Protect the Puget Sound.”
- 2013 National United Way meeting: Panelist on Supporting Collective Impact
- 2013 National meeting of the Association for Strategic Planning: “How Strategy Management Systems Improve Alignment & Execution.”
- 2013 National Association of Local Boards of Health annual meeting and the Utah Public Health Association annual meeting: presentation on “Emerging Best Practices for Community Engagement and Collective Impact.”
- 2013 ACHI (part of the American Hospital Association) Webinar (with Cheshire Medical Center) on “Maximizing the Value of Community Benefit through Collective Impact and Technology.”
- 2013 Keynote Address on Collective Impact for the Missouri Healthy Lifestyles Summit

- 2012 Association for Strategic Planning national meeting: Co-presented with Hunterdon Regional Health on Collaborative Strategy Management.
- 2012 National Network of Public Health Institutes: Two roundtable discussions Collective Impact.
- 2011 American Hospital Association's Society for Healthcare Strategy and Market Development (SHSMD) national conference presentation on Best Practices for a Collaborative Community Health Needs Assessment

Scorecard and performance expert, James Creelman, author of the recent book, "Doing More with Less: Measuring, Analyzing and Improving Performance in the Not-For-Profit and Government Sectors" described Mr. Barberg as a "global thought leader" on the topic and stated that "his knowledge of the do's and don'ts of building scorecards is as good as anyone in the world, and some of his innovations, especially around creating space for partner collaborations are simply unrivalled." (LinkedIn recommendation) Mr. Barberg is the group moderator for Collective Impact for Community Commons [www.communitycommons.org](http://www.communitycommons.org) and is the author of important White Papers on that site.

### ***Examples of Some Recent Client Engagements***

- **LiveWell San Diego**, Leading consulting to support Collective Impact and implementing digital backbone technology for health improvement, including five integrated Community Health Improvement Plans and county Public Health performance management.
- **Healthy Start Collective Impact Coalition**, Detroit, MI. Lead consultant for advising the large Collective Impact effort in Detroit to reduce infant mortality.
- **Oxford County Maine Wellness Coalition**. Guided the Collective Impact work of the multi-stakeholder healthy community initiative that was a finalist to be selected for the Way to Wellville competition.
- **Ridgeview Medical Center**, Waconia MN. Led a Community Health Needs Assessment (2013)
- **Weld County Health Department** – Led a Collective Impact coalition through the development of strategy maps and the deployment of InsightVision technology platform. Supported development of a Community Balanced Scorecard. (2013-2014). Leaders of the Weld County Health Department did a workshop showcasing their work to achieve Collective Impact (along with Mr. Barberg) at the Public Health of the Rockies conference in September of 2014.
- **Carver County Health Partnership** – Led a series of community forums to develop strategy maps on Healthy Eating and Active Living (2013) as the "Common Agenda" for guiding their Collective Impact efforts.
- **Jefferson County, Colorado Department of Public Health** – provided consulting and technology to support their journey to become accredited based on the Public Health Accreditation Board (PHAB) standards (2013-2014)  
This client co-presented with Bill Barberg at the 2014 meeting of the National Association of County and City Health Officials.
- **Snohomish County, WA Health Department**—supporting the deployment of the InsightVision "digital backbone" for Collective Impact to improve community health (2013-2014)
- **Will County, IL Health Department, United Way, and area hospitals** – Helped with the implementation of their Community Health Improvement Plan and development of strategy maps (2013)  
This client presented on our work with them at the 2013 national conference for the Association for Community Health Improvement on "A Journey of Strategic Change Toward Healthier Communities." The same group presented at The Catholic Health Association's 2013 National meeting in a pre-conference workshop on "Taking Action after the Needs Assessment: How to Implement Change in Your Community."
- **Cheshire Medical Center, Keene, NH** — Supported the deployment of strategy maps and a community balanced scorecard approach to implement their Vision 2020 community health improvement plan (2013) and also worked on process improvement efforts involved with their being an Accountable Care Organization.  
This client co-presented with Bill Barberg in a national Webinar on Collective Impact (mentioned above)
- **St. Clair County, IL Health Department and Get Up & Go! campaign** — provided consulting, training and support to improve community collaboration and Collective Impact, along with the deployment of InsightVision.  
This client has co-presented and showcased their work with Bill Barberg at multiple national events.

- **University of Utah Health Care (UUHC) IT Services Division** – Guided and facilitated their adoption of “Strategy-Aligned Management” and the use of the InsightVision Software.  
UUHC CIO Jim Turnbull (Executive Sponsor and project champion) was named 2012 Healthcare CIO of the Year and stated that “Strategy-Aligned management is the foundation upon which a disciplined approach to leveraging strategy maps and balanced scorecards makes order out of chaos as we move into the future.”
- **City of Bellingham, WA** – supported the deployment of InsightVision as a shared measurement system.
- **State of Delaware Department of Public Health** – Supported the deployment of the InsightVision software.
- **Public Health Institute of Metropolitan Chicago** – Implementing the Communities Putting Prevention to Work plan to manage 70 sub-grantees and hundreds of projects for reducing obesity in suburban Chicago.  
Patrick Lenihan, our executive sponsor, stated: “Deploying InsightVision was the highlight of our [Communities Putting Prevention to Work] CPPW Program.” And “It is especially useful for tracking agency performance, overall project activities, and for demonstrating progress in a very tangible way, especially to elected officials and key stakeholders. We will be extending it to all of our projects and see it as part of our strategic capacity building that demonstrates how we can add value in managing collaborative efforts. And we are recommending the platform to all [Local Health Departments] LHDs for these activities.”

### Relevant References:

“In my 17 years of conducting best practice research in the Balanced Scorecard, I can think of no one who has inspired me more - and who speaks so much sense! Without hesitation I recommend Bill as a consultant to any organization that is progressing along a scorecard journey.”

*James Creelman, Author and Performance Management expert*

**March 30, 2012 (LinkedIn)**

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“Mr. Barberg is a consummate professional with a keen insight as to the development, deployment and execution of strategy. Over the past several years, his expertise surrounding the Balanced Scorecard and strategy execution has greatly added to the vitality of our conferences. Furthermore, the executives attending our conferences have consistently evaluated Mr. Barberg's speaking engagements with high scores; often noting his ability to provide them with practical solutions for their business issues. Thus, it is with great pleasure that I recommend Bill Barberg as both a consultant and public speaker.”

*Try L. Muller, MBA, Former Conference Coordinator*

**December 21, 2010 (LinkedIn)**

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“Bill is a consummate professional who gave unsparingly of his time to school me in the nuances of the balanced scorecards methodology for my book, “Performance Dashboards: Measuring, Monitoring, and Managing Your Business.” He greatly accelerated my understanding and enabled me to meet tight deadlines. Bill is incredibly enthusiastic and committed to helping companies optimize performance and achieve their goals using strategy management techniques. He's a true gem in the industry.”

*Wayne Eckerson, Director, TDWI Research, The Data Warehousing Institute (TDWI)* **January 3, 2011 (LinkedIn)**

“The consulting piece is critical because it’s the training. I mean, there’s a right way to embark on this journey. You need to know how to go about it. You need to know how to communicate. The consulting piece that was absolutely critical. Now what you guys did was train us. You didn’t just come in and feed us. You trained us to fish and feed ourselves and so that’s the other value that came out of the consulting side of things. Now we can manage this stuff ourselves. .... I think it [Strategy Management] is a beautiful concept and it’s something that every organization should make a top priority. And people just don’t understand the extent with which you need to take strategy management in order to be successful.”

*Jim Livingston, Associate CIO of University of Utah Health Care (Client) in a March 2013 Interview*

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Bill is highly knowledgeable about strategy management, balanced scorecard, and building collaborations. He has a unique way of articulating the highly complex in a simplified, understandable way. He is well-respected locally and nationally for his work in improving organizations and communities.

**Brian Lassiter**, *President of the Performance Excellence Network and Chair of the Board of Directors for the national consortium of all state/local quality awards.*

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