

# Building Scorecards in Academic Research Libraries

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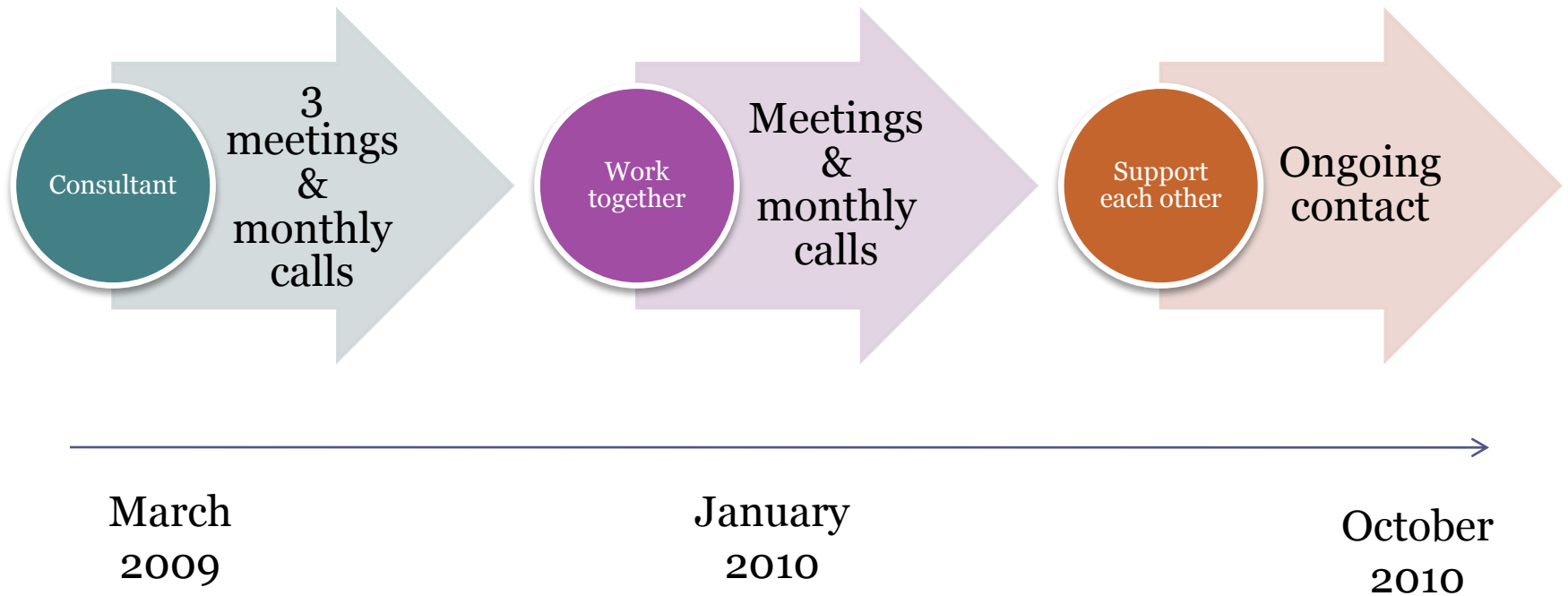
# Today's topics

- ✓ The ARL initiative
- ✓ Experiences of participating libraries
- ✓ Show common objectives and measures
- ✓ Share challenges
- ✘ How to implement a Balanced Scorecard

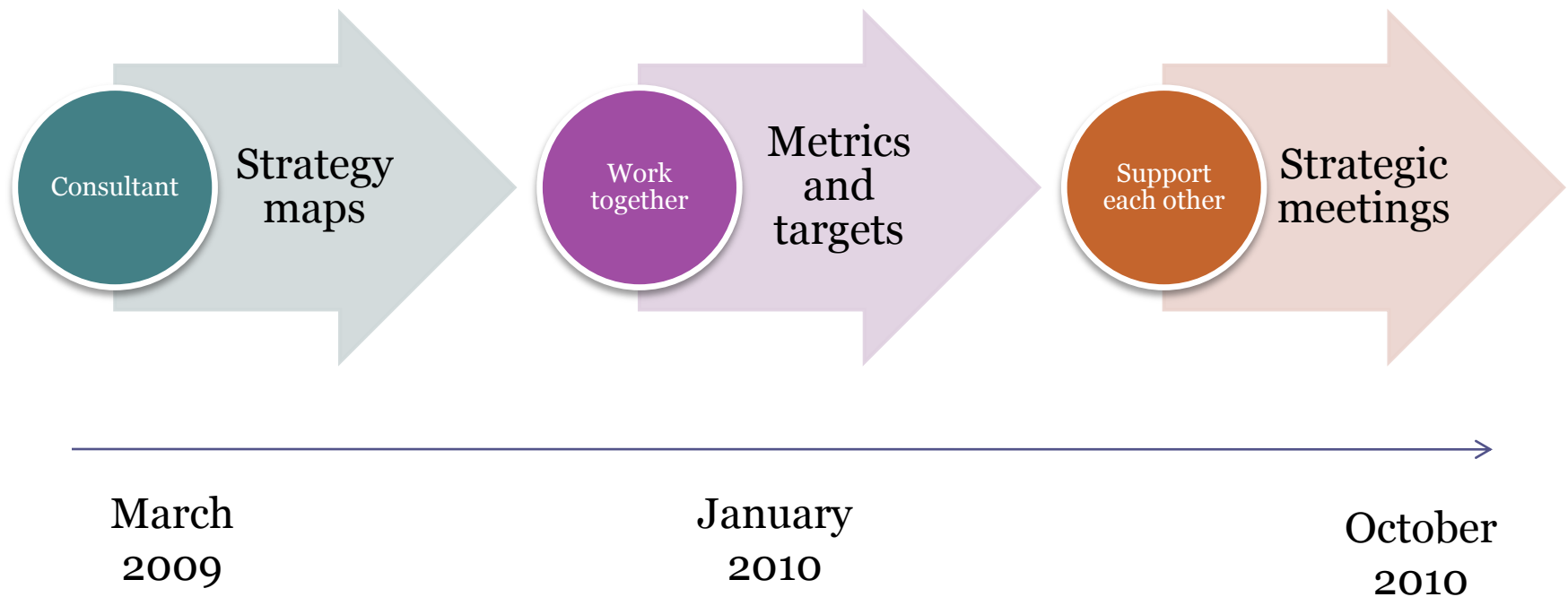
# Goals of the ARL Initiative

- Explore suitability of the model for academic research libraries
- Benefit from consultant expertise
- Encourage cross-library collaboration
- Would common objectives and metrics emerge?

# How did it work?



# What have we accomplished?



# Four perspectives outline goals



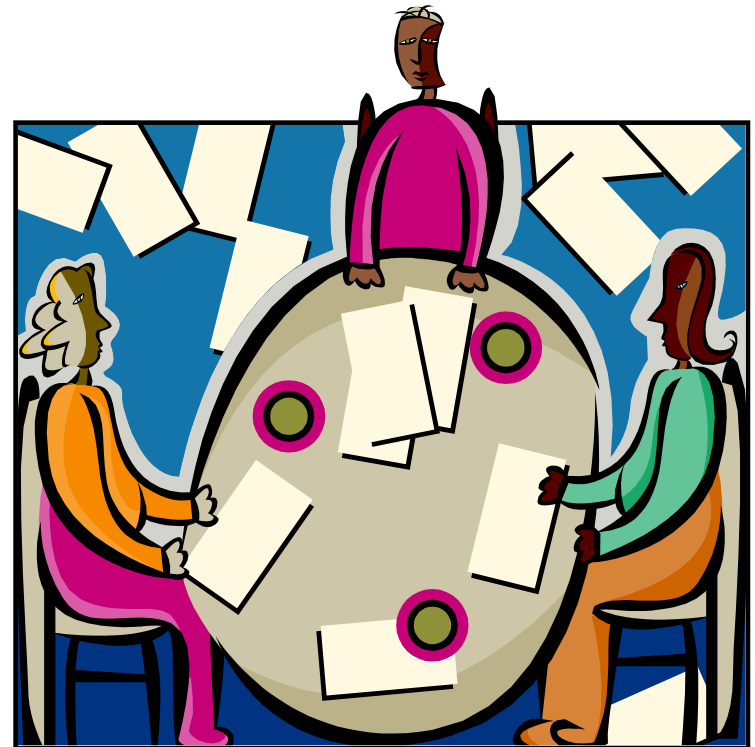
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# Not the way we typically work...

- Most of us lack robust process for identifying or executing strategy
- Assessment often not tied to strategy
- Resources often allocated based on history or “loudest voice”
- Often operate as silos rather than unified whole

# Introduction of participating libraries -

- Why were we interested in the Balanced Scorecard



# Number of Objectives by Perspective

Library	Customer	Financial	Learning & Growth	Internal Processes	Total
JHU	4	3	2	2	11
McMaster	4	1	3	2	10
UVA*	3	3	3	9	18
UW	3	3	3	5	14
	14	10	11	18	53

\* UVA numbers based on 2007/2009 scorecard

# Commonalities in objectives

- **Financial Perspective Objective**
  - Secure funding for operational needs (4)
- **Customer Perspective Objective**
  - Provide productive and user centered spaces, both virtual and physical (4)
- **Learning and Growth Perspective Objective**
  - Develop workforces that are productive, motivated, and engaged (4)
- **Internal Processes Perspective Objective**
  - Promote library resources, services, and value (3)

# Commonalities in Metrics

Library	# Objectives	# Measures	Average # of Measures/Obj.
JHU	11	48	4.3
McMaster	10	26	2.6
UVA	18	36	2
UW	13	26	2

# Providing productive user-centered space

- JHU
  - LibQual
  - User assessment resulting in new strategies
- McMaster
  - LibQual
  - # of quiet study seats
  - Gate count
- UVA
  - Response to equipment service requests
  - Renovation of space
  - Reliability of servers
- UW
  - User survey (homegrown)
  - Gate count

# Selecting Appropriate Measures

- Does the metric directly measure performance to achieve the objective?
- What data is needed for the measure?
- How often should the data be collected and used?
- How many measures are needed for each objective?
- How should the measurement be presented?

# Organizational Challenges

- Making the scorecard “understandable” to staff
- Requires significant time and intellectual effort
- Needs ongoing commitment from leadership
- Getting “attention” for longer-term strategy while addressing immediate budget concerns
- Clarifying decision-making responsibility
- Convincing staff that this wasn’t “strategic planning as usual”
- Convincing some that measures do matter

# Outcomes:

## Original Reasons for Participation

- JHU: Move towards a culture of assessment and data driven decision making
- McMaster: Linkages between strategic plan, assessment activities and projects were tenuous at best. Tool for fledgling assessment program.
- UVA: Share our Scorecard experience and revisit our Scorecard and how we were using it.
- UW: Better integrate strong assessment program with strategy, planning, and operations.

# What We Found (Common to All!)

- Strategy trumps metrics
- Organizational change & transformation facilitated
- Better linkages between assessment, planning and operations
- A work in progress that continues to evolve

We all believe in the Scorecard as an excellent organizational performance model and are committed to its success at our libraries.

# What Did We Learn?

## **BSC is:**

- A performance management system
- Built on the foundation of clear organizational strategy
- A way to align resources and drive change

## **BSC is not:**

- Only an assessment tool or data container
- Effective unless tightly tied to strategic priorities
- An isolated project that can be managed by a few people

# Advice?

- Leadership, a “champion”, and believers are critical to success
- Tire store analogy (align, balance, rotate, adjust, and go for that 100,000 mile tread!)
- Don’t be driven (or sidetracked by metrics). Let institutional and organizational priorities drive metrics. The numbers will come . . .
- Any tool that forces you to identify priorities, measure what matters, and engage staff about the future is valuable

# Questions

# Where we're at

- Strategy Maps