Serving Multiple Stakeholders

Crafting a blended scorecard at the University of Minnesota Health Sciences Libraries
Balanced Scorecard (BSC)

- Historically, assessment focused on *financial* bottom line
- BSC first introduced in the business world to assess four perspectives of an organization:
  - User/Customer
  - Financial
  - Internal Process
  - Learning and the Future
- Four perspectives help identify a small set of carefully selected and “balanced” measures that reflect the organization’s mission
- Evaluation based on these measures provides a quick, comprehensive picture of organizational performance over time
BSC in Practice

• Used widely by for-profit and not-for-profit organizations
• Success in large academic libraries and public libraries
• Not yet tested in Academic Health Sciences Libraries
  – Does not account for complex reporting structures
  – Does not speak the language of libraries or stakeholders
BSC in Health Sciences Libraries

- Health Sciences Libraries have long struggled identifying measures to prove value – including the HSL

- HSL collects 222 data points, but which ones are important?
  - 129 (58%) used for internal management decisions
  - 56 (25%) collected manually
  - 49 (22%) collected monthly

- High investment for small return
Several events led to HSL Metrics that Matter goal and project team:

- MN Office of Higher Education developed state goals and indicators for performance accountability (2005)
- Board of Regents approved strategic plan with a charge to identify metrics and measures to monitor progress towards goals (2005)
- Library funding changed from a “common good” to a “cost allocation pool” budget model (2006/2007)
BSC @ HSL

• HSL Metrics that Matter team formed (2006)
  – Charge: Identify and measure activities that express outcomes and impacts that are meaningful to funders and constituents

• Final report and recommendations completed (2007)
  – Use modified BSC to structure HSL evaluation
  – The modified BSC should reflect the mission of the library’s parent organization
blendedBSC @ HSL

• HSL’s Management Team modified the BSC perspectives, creating a blendedBSC

• The blendedBSC reflected the original BSC perspectives and Academic Health Center mission that focuses on education, research and outreach in the health sciences

AHC Mission

Educate the next generation of nurses, pharmacists, public health professionals, and veterinarians

Discover and deliver new preventions treatments, and cures that improve the health of families and communities

Enhance Minnesota’s bioscience industries and grow the state’s economy
blendedBSC @ HSL

**blendedBSC Perspectives**

1. **Education & Learning**
   - How well is the library contributing to user success in teaching and learning in order to prepare the next generation of health professionals?

2. **Research & Clinical Care**
   - How well is the library providing expertise, resources and delivery systems to help researchers and clinicians discover and translate new knowledge and sustain the vitality and excellence of Minnesota’s health care?

3. **Service & Outreach**
   - How well is the library providing outreach and developing partnerships to improve the health of Minnesotans and build a culture of service and accountability?

4. **Internal Businesses Processes & Learning and Growth**
   - How does the library’s internal processes and organizational capacity function to efficiently deliver library resources and services?
Findings

- *blended* BSC perspectives resonate with stakeholders
- *blended* BSC framework too complex
- Selecting the “right” data points is difficult and takes time

### Example Perspective

#### Internal Business Processes & Learning and Growth Perspective
How does the library’s internal processes and organizational capacity function to efficiently deliver library resources and services?

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Linkages</th>
<th>Activities</th>
<th>Measures</th>
<th>Targets</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximize External Library Funding</td>
<td>HSL 4 UL 7 AHC 2</td>
<td>I (4a): Develop and implement an external funding plan: a. Develop plans/ideas for fund-raising b. Obtain or participate as collaborators in grants c. Maximize use of current endowments</td>
<td>Percentage of external funding as portion of total HSL budget</td>
<td>T1: External funding represents 3% of HSL budget T2: External funding represents 1% of annual budget</td>
<td>Target 1</td>
</tr>
</tbody>
</table>
Current Progress

The HSL successfully...

☑ Created the blended BSC framework
☑ Drafted HSL goals (2009-2010)
☑ Incorporated goals framework

The HSL did not...

☒ Identify relevant measures and targets
☒ Collect data for each of the measures
Next Steps

• Continue working to develop a *blended* BSC framework that is both *useful* and *usable*

• Recommendation to break the *blended* BSC from the HSL’s annual goals
  – Allows for the selection of a small set of high-level measures and targets
  – Creates a more static document as measures do not change from year to year with changing goals
  – Provides continuity of measures over time to capture baseline and comparison data
Expected Outcomes

• Implementation of a simplified *balanced* BSC will measure the extent to which organizational goals have been met

• Results will be used internally to set future goals, and externally to communicate successes and areas for improvement

• When used annually, comparison statistics will be collected to see success over time
Questions?

Thank you.

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