

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



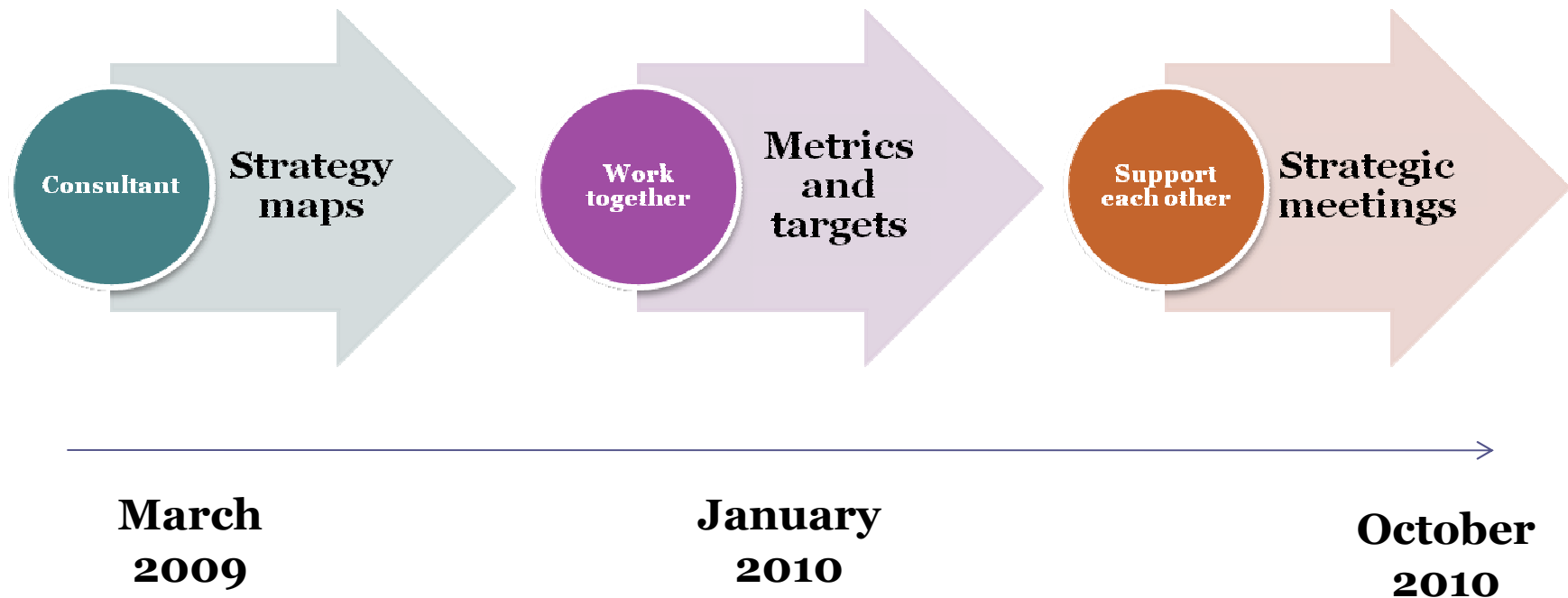
Goals of the ARL Initiative

- 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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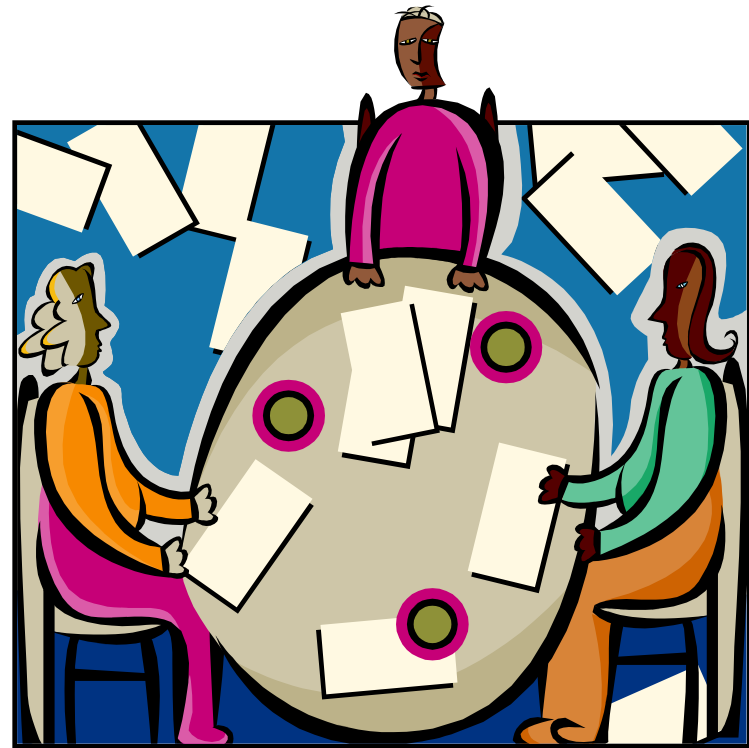


Not the way we typically work...

- 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
JHU	4	3	2	2
McMaster	4	1	3	2
UVA*	3	3	3	9
UW	3	3	3	5

* UVA numbers based on 2007/2009 scorecard

Commonalities in objectives

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



2 Minute Exercise:

Work with a partner to come up with one measure associated with the objective “Create productive and user centered spaces.”

Measures

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 scorecard “understandable”
- Requires significant time and intellectual effort
- Leadership
- Attention for strategy vs. immediate concerns
- Decision-making
- Convincing that measures do matter

Outcomes:

Original Reasons for Participation

- JHU: culture of assessment & data driven decision making
- McMaster: Establish linkages between strategic plan, assessment activities and projects. Tool for fledgling assessment program.
- UVA: Share our Scorecard experience. Revisit and how we were using it.
- UW: Better integrate assessment program with strategy, planning, and operations.



What We Found (Common to All!)

- Strategy trumps metrics
- Organizational change & transformation facilitated
- Alignment and linkage between assessment, planning and operations
- Work in progress that evolves

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
- Tire store
- Don't be driven (or sidetracked by metrics).
- **Any tool that forces you to identify priorities, measure what matters, and engage staff about the future is valuable**



Questions



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