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?

- March 2009: Consultant
  - 3 meetings & monthly calls

- January 2010: Work together
  - Meetings & monthly calls

- October 2010: Support each other
  - Ongoing contact
What have we accomplished?

- March 2009: Consultant Strategy maps
- January 2010: Work together Metrics and targets
- October 2010: Support each other Strategic meetings
Four perspectives outline goals

**Mission**
What is our plan to achieve our mission and vision?

**Customer Perspective**
"To achieve our mission, how must we look to our customers?"

**Financial Perspective**
"If we succeed, how will we look to our donors or taxpayers?"

**Internal Perspective**
"To satisfy our customers and financial donors, which business processes must we excel at?"

**Learning and Growth Perspective**
"To achieve our mission, how must our organization learn and improve?"

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

<table>
<thead>
<tr>
<th>Library</th>
<th>Customer</th>
<th>Financial</th>
<th>Learning &amp; Growth</th>
<th>Internal Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>JHU</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>McMaster</td>
<td>4</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>UVA*</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>9</td>
</tr>
<tr>
<td>UW</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>

* 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

<table>
<thead>
<tr>
<th>Library</th>
<th># Objectives</th>
<th># Measures</th>
<th>Average # of Measures/Obj.</th>
</tr>
</thead>
<tbody>
<tr>
<td>JHU</td>
<td>11</td>
<td>48</td>
<td>4.3</td>
</tr>
<tr>
<td>McMaster</td>
<td>10</td>
<td>26</td>
<td>2.6</td>
</tr>
<tr>
<td>UVA</td>
<td>18</td>
<td>36</td>
<td>2</td>
</tr>
<tr>
<td>UW</td>
<td>13</td>
<td>26</td>
<td>2</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>BSC is:</th>
<th>BSC is not:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A performance management system</td>
<td>• Only an assessment tool or data container</td>
</tr>
<tr>
<td>• Built on the foundation of clear organizational strategy</td>
<td>• Effective unless tightly tied to strategic priorities</td>
</tr>
<tr>
<td>• A way to align resources and drive change</td>
<td>• An isolated project that can be managed by a few people</td>
</tr>
</tbody>
</table>
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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