Welcome

Martha Kyrillidou
Senior Director
ARL Statistics and Service Quality Programs
Association of Research Libraries
Thank you for joining us

- Everyone will be muted to cut down on background noise
- We welcome questions. Please type your questions and Raynna Bowlby stands ready to answer all of them
- Questions and answers that we do not address as well as the ones we address will be distributed to attendees after the webcast along with the recording
ARL Strategic Outcomes

• Building assessment capacity within organizations and supporting individual growth in this area for improved alignment of strategy and metrics

• Building a community of practice around library assessment
Introductions

- Winston Tabb, Dean of Libraries, Johns Hopkins
- Ted Jackson, Ascendant Strategy Management
- Liz Mengel, Head, Collection Management, Johns Hopkins
- Vivian Lewis, Associate University Librarian, McMaster
- Steve Hiller, Director of Planning and Assessment, U of Washington
- Betsy Wilson, Dean of Libraries, U of Washington
- Martha Kyrillidou, Association of Research Libraries
Agenda

• Background
• JHU Scorecard Rational -- Leadership perspective
• Ted Jackson “Introduction to the Balanced Scorecard”
• Liz Mengel “Transforming an Existing Scorecard”
• Vivian Lewis “Starting from Scratch”
• Steve Hiller “Planning and Strategy Maps”
• Ted Jackson “Communication and Strategy Review”
• “Measures and Communication” by Steve, Liz and Vivian
• U of Washington story by Betsy Wilson
• Questions and Answers as time allows
Background

- 2009 ARL Library Scorecard Pilot program with four libraries in partnership with Ascendant Strategy Management
- 2010 Fall Forum panel presentation [Balanced Scorecard: A Framework for Strategic Change](http://www.libraryassessment.org)
- Invite participation of additional libraries with Feb 14, 2011, webcast
JHU Scorecard Rationale

- Organizationally
  - Developing capacity in assessment
  - Creating data driven, transparent decisions
- Institutionally
  - High level change (President, VP Finance, Provost)
  - How to demonstrate value
  - Beginning of the economic crisis
- Benefits
  - Focus
  - Cross departmental cooperation
  - Mindset change
Introduction to the Balanced Scorecard

Ted Jackson
www.ascendantsmg.com
Does strategy work?

9 of 10 organizations fail to execute strategy

The Vision Barrier
Only 37% said they have a clear understanding of what their organization is trying to achieve.

The People Barrier
Only one in five was enthusiastic about their team's and organization's goal.

The Alignment Barrier
Only one in five said they have a clear "line of sight" between their tasks and their organization's goals.

The Resource Barrier
Only 15% felt that their organization fully enables them to execute key goals.

Source: Stephen R. Covey, The 8th Habit: From Effectiveness to Greatness ©2006
Does strategy work? Often, sadly, the answer is no.

The People Barrier
Only two of the 11 would care.

The Vision Barrier
Only four of the 11 players on the field would know which goal is theirs.

The Alignment Barrier
Only two of the 11 would know what position they play and know what they are supposed to do.

The Resource Barrier
And all but two players would, in some way, be competing against their own team members.

The soccer team would lose 9 out of 10 games!

Source: Stephen R. Covey, The 8th Habit: From Effectiveness to Greatness ©2006
Can these odds be improved? Yes!

<table>
<thead>
<tr>
<th>Duke Children’s Hospital</th>
<th>Hillside Family of Agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Parent Sat. up from 4.3 to 4.7</td>
<td></td>
</tr>
<tr>
<td>• Cost per case down 33%</td>
<td></td>
</tr>
<tr>
<td>• Length of stay down 31%</td>
<td></td>
</tr>
<tr>
<td>• Nursing absentee down 42%</td>
<td></td>
</tr>
<tr>
<td>• Net Margin up $15 Million</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fulton County Schools</th>
<th>Canadian Blood Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>• SAT up 23 pts over nation with 89% testing vs. 48%</td>
<td></td>
</tr>
<tr>
<td>• 82% parent Sat. vs. 68% nationally</td>
<td></td>
</tr>
<tr>
<td>• Teacher vacancies and admin expenses down</td>
<td></td>
</tr>
<tr>
<td>• 5 pt annual improvement in state tests for 3 years</td>
<td></td>
</tr>
</tbody>
</table>

| | • Reduced engagement wait time 56% |
| | • Shrank administrative overhead 25% in 2 years |
| | • Exceeded revenue growth targets for 8 quarters in a row |
| | • 65% increase in donor satisfaction in 2 years |
| | • 70% increase in hospital satisfaction in 2 years |
| | • 20% increase in red blood cell yield, saving $3 M |
| | • Restored public trust in Canada blood supply |

Executing strategy is a three-step process

Plan
Where are we going?
• Purpose/Mission
• Strategy Map

Measure
Are we there yet?
• Measures
• Targets

Respond
Can we react?
• Initiatives
• Review & Revise
Example: Teach for America

Background
- Founded 1990
- Placed highly qualified college grads in underserved schools
- Started with 500 teachers

Challenges
- Mid ‘90s outgrew startup phase
- Lack of preparation
- Poor lesson planning
- Lack of support

More Challenges
- 2001 recession job market sent applications from 5,000-14,000
- No Child Left Behind complicated Corp Qualifications
- 10 year alumni summit focused on growth and impact
First, they had to clearly define who they were

Improve the prospects of low-income youth of today and tomorrow by training and placing highly qualified college graduates in at-risk, low-income urban and rural schools.
Teach for America's Strategy Map

**Social Impact**
- Improve Prospects of Low-Income Youth
- Impact Tomorrow's Low-Income Youth

**Constituent**
- Engaged Corp Members
- Motivated Alumni

**Internal Operations**
- Grow Corps Member Base
- Enhance Corps Member Effectiveness
- Catalyze Alumni Movement

**Financial**
- Grow and Diversify Revenue Base
- Good Financial Management

**Organizational Capacity**
- Diverse Team
- Effective Managers
- Technical Capacity
- National Board
- Expansion Plan
A Research Library would start by building its “purpose statement”

O
Objective

Similar to the vision statement, often with a quantitative goal such as # of students served, Wait time in emergency rooms, % of participants holding a job for over 6 months

A
Advantage

A statement of differentiation. What will your organization do differently, better or uniquely versus comparable organizations. E.g. Utilizing a family plus student framework, Focusing on preventative health as well as treatment, etc.

S
Scope

The target market segment, defined product line, geography covered or whatever other limits define your focus. Such as early childhood education, pre-teen – teen age women’s health center, college qualified men, etc.

Example: Academic Research Library (UVA)

"Enabling research, teaching, and learning (O) through services, collections, tools, and spaces (A) for the faculty and students of today and tomorrow (S).

- **Objective (O):** The ends that the strategy is designed to achieve
  - Enabling research, teaching, and learning

- **Advantage (A):** The means by which the enterprise will achieve its objective
  - Through services, collections, tools, and spaces

- **Scope (S):** The domain or niche in which the enterprise intends to operate
  - For the faculty and students of today and tomorrow
Perspectives Outline the Major Goals of the Organization

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?"

Questions
Transforming an Existing Strategic Plan into a Scorecard

- Yes it can be done! KISS
- Is your strategic plan strategic?
- Advantages
  - Big objectives/goals set
- Disadvantage
  - Letting go
- How many objectives are too many?

Liz Mengel
Sheridan Libraries Strategic Plan 2006 - 2011
9/12/06

MISSION

The mission of The Johns Hopkins University is to educate its students and cultivate their capacity for life-long learning, to foster independent and original research, and to bring the benefits of discovery to the world.

The primary mission of the Sheridan Libraries is to advance research, teaching, and learning through significant collections, services, and instruction for faculty, students, and staff in the School of Professional Studies in Business and Education. The libraries also provide a student-centered environment for study and learning.

VISION: 2010

The Sheridan Libraries provide indispensable support for the intellectual, cultural, and social life of the university community, making accessible the information our primary users need - when, where, and how they need it - in a study environment at Homewood; by helping faculty and students make effective use of information; and by providing design and teaching support for University faculty and teaching assistants; and by providing access to electronic resources.

Scholarly communication increasingly occurs through electronic formats, but this is only a part of the information itself. The Libraries direct substantial resources towards ensuring that the information management knowledge new technologies. The Sheridan Libraries are world leaders in these areas.

The Sheridan Libraries provide an exemplary work environment where staff can develop and innovate.

Goals and Objectives to 2010

Goal 1 - Expand and Preserve Access to Information for the Current and Future Hopkins Academic Community, Including Navigating and Mastering the Changing Information Environment.

A. Build and Strengthen Collections to Support New and Existing Programs

1. Design and conduct a collection and preservation assessment that analyzes and evaluates the collection size, strength, and location. Review collection policies to ensure they support our position on alternatives for cost-effective access to information (2006-2009, then repeat).
2. Develop a simple and equitable program for cost-sharing electronic resources among all library members. (UI)
3. Lead an effort to build collections collaboratively among JHU libraries and other institutions. (LS-DS lead role, other institutions participate).

B. Strengthen, Preserve and Improve Access to Our Materials Collections.

1. Expand the discovery and retrieval of information linked to by the JHU libraries.
   a. Provide standardized names, titles, and subjects with respective cross references (TS, LS, 2008-ongoing).
   b. Determine the process by which we will obtain limited term staff funding and implement an electronic resource catalog system to provide access to electronic resources and the management and tracking of electronic resources by staff (Systat).
   d. Share JHU URLs with Google so that anyone searching for e-resources via Google can link directly to the JHU site.
   e. Integrate discovery tools (e.g., online catalog, webpage, portal) with Metalib XServer (Systems & LS 2007 - present).
   f. Implement full multi-lingual display capabilities of the Libraries' web technologies and ensure that all public workstations are able to display non-Roman vernacular scripts and ISO compliant language characters. (Systat)
2. Develop a strategy for systematically identifying and tracking how users are experiencing access/retrieval. (LS-DS lead role, other institutions participate)
3. Initiate a preservation assessment for all the JHU Libraries collections, and include a regular program of handheld checks for the staff at these locations. (SL, ULC, 2006-2009)
4. Bring Sheridan Libraries website into compliance with federal and JHU web accessibility guidelines and laws. (SL)

C. Preserve and Improve Access to the University's Research Output

1. Develop policies for and implement an institutional repository, based on University needs (IR Steering Committee).

D. Assess strengths and reduce redundancies throughout Hopkins libraries and build cooperative models to provide information for all Hopkins students, faculty, and staff.
**Mission:** Advance research, teaching, learning at JH by providing relevant and significant collections, services, and instruction for faculty, students, and staff as appropriate for the schools each library supports. The Sheridan Libraries through the University Libraries Council partners with other JH libraries to maximize support for our constituents while minimizing costs.

**Customer Needs:**
- Productive, User-Centered Workspaces
- Fast and Easy Access

**Financial Perspective:**
- Develop strong support base

**Internal Processes**
- **Communications**
  - Development of Digital Libraries
  - Acquire, Organize, Preserve, and Promote Collections
- **Programs**
  - Assist faculty and students in navigating information life-cycle
  - Create productive research, learning, study, social space
- **Operational Efficiency**
  - Manage knowledge with new technologies

**Learning And Growth**
- Develop team and technical skills
- Adaptive, Collaborative, Engaged, Innovative Culture
- Assessment and Accountability
Mission: To advance research, teaching, learning at Johns Hopkins University by providing relevant and significant collections, services, and instruction for faculty, students, and staff. The Sheridan Libraries through the University Libraries Council partners with other Johns Hopkins Institutions libraries to maximize support for our constituents while minimizing costs.

Customer Needs
- Productive, user-centered workspaces (virtual and physical) (WT)
- Fast, easy access to resources and services needed for research and teaching (DS/SC)

Financial Perspective
- Minimize costs (from mission) (KF)
- Develop a strong support base (JE)

Internal Processes
Communications
- Engage community in the intellectual experience the library provides (BS/MB)

Programs
- Integrate and strengthen instructional and research support services and programs (CD/MB)
- Provide and preserve access to information resources for current and future JHU (DS/LM/SC)
- Create productive research, learning, study, and social space (WT)

Operational Efficiency
- Build sustainable data curation infrastructure (SC)
- Identify and improve processes and infrastructure with greatest impact (KF/DS/SC)

Learning And Growth
- Hire, train, develop, and retain productive highly qualified staff (GM)
- Live the organizations values in the workplace. (GM)
- Create a culture of assessment and accountability (LM/GM/KF)
Mission: To advance research, teaching, learning at Johns Hopkins University by providing relevant and significant collections, services, and instruction for faculty, students, and staff. The Sheridan Libraries primarily serve the Krieger School of Arts and Sciences, Whiting School of Engineering, the Carey Business School, and the School of Education, but also serve as a resource for the libraries serving the university’s other divisions. The museums serve the entire Johns Hopkins community as well as the people of Baltimore.

June 2010 FY11

1. Provide productive and innovative user-centered research, learning, teaching, and social spaces (Deborah Slingluff)
2. Strengthen, integrate and streamline instructional and research services (Margaret Burri and Candice Dalrymple)
3. Provide, preserve and facilitate access to information resources and collections (Deborah Slingluff)
4. Build a sustainable data curation infrastructure (Sayeed Choudhury)
5. Strategically align resources (Ken Flower)
6. Generate resources to advance mission (Winston, Ken, Josh, Barbara)
7. Identify and improve infrastructure (Ken Flower)
8. Foster a highly motivated, productive and diverse workforce (Gwen Martins)
9. Become a strategy and mission driven organization (Liz Mengel)
10. Promote value and availability of library and museum services (Margaret Burri)
11. Advocate for the development and adoption of information policies that facilitate access to information (Winston Tabb)
Starting from Scratch

• Starting with a clean slate
• Having a process (any process!)
• Creating balance
• Choosing / filtering
• Using data for decisions
• Aligning activity (at last!)
• Talking about strategy

Vivian Lewis
AUL, Organizational Development
McMaster University
Strategy Map | 2010/2013

Focus on faculty, students and university staff
- Strive for exemplary service that is responsive to user needs
- Create world-class teaching & learning spaces
- Improve discovery of and access to scholarly resources
- Integrate the Library into the University’s teaching, learning and research mission

Focus on library staff learning and growth
- Grow an evidence-based culture that encourages innovation and risk taking
- Nurture a healthy, collaborative, and dynamic work environment
- Develop highly-trained, technologically-fluent superlative staff

Focus on library processes
- Track efficiency and effectiveness of Library programs and services
- Promote awareness of the Library’s rich collections, state-of-the-art facilities and exemplary services

Focus on financial health
- Secure appropriate financial resources to maintain a world-class research library

The Library’s Strategic Plan is a living document. For current information on specific initiatives or to access our Library Scorecard, please visit our website at library.mcmaster.ca/mission
Previous strategic plans were time consuming, labor intensive and all encompassing. Emphasis on planning process, not strategy and execution.

In 2008 began to look at new process to integrate focused strategy with performance measures and operations.

Strategy Map and Scorecard is the heart of our new 2011-13 Strategic Plan, “Building Sustainable Futures”

Steve Hiller
Mission: Advancing Intellectual Discovery and Enriching the Quality of Life by Connecting People with Knowledge

Strategic Directions: Research & Scholarship · Teaching & Learning · Engagement · Sustainability

Perspectives:

- Customer Services
  - Enhance UW teaching and learning
  - Advance research and scholarship
  - Provide productive and engaging library spaces

- Financial/Stakeholder
  - Develop a sustainable academic business plan
  - Evaluate one library three campus model

- Internal Processes
  - Apply and assess new subject librarian framework
  - Realign online and print services support
  - Review and revise collections and digitization strategies
  - Create a sustainable foundation for delivering/assessing teaching and learning

- Learning & Growth
  - Align organizational capacity and structure with resources
  - Focus staff expertise/work on strategic priorities/actions
  - Provide infrastructures that support users and staff work

Organizational Values: Collaboration · Diversity · Excellence · Innovation · Integrity · Responsiveness
Measures help communicate what is important

Plan
Where are we going?
• Purpose/Mission
• Strategy Map

Measure
Are we there yet?
• Measures
• Targets

Respond
Can we react?
• Initiatives
• Review & Revise
Teach for America's measures

- **Social Impact**
  - Improve Prospects of Low-Income Youth
    - Measure: Corps Member Reporting Satisfied or Above
      - Target: 75%
  - Impact Tomorrow’s Low-Income Youth

- **Constituent**
  - Engaged Corp Members
  - Motivated Alumni
    - Measure: % of Alumni Attending Events
      - Target: 50%

- **Internal Operations**
  - Grow Corps Member Base
  - Enhance Corps Member Effectiveness
  - Catalyze Alumni Movement
    - Measure: % of staff diversity
      - Target: 40%

- **Financial**
  - Grow and Diversify Revenue Base
  - Good Financial Management
    - Measure: Total Revenue
      - Target: $XXX,XXX

- **Organizational Capacity**
  - Diverse Team
  - Effective Managers
  - Technical Capacity
  - National Board
  - Expansion Plan
## Teach for America's Scorecard

<table>
<thead>
<tr>
<th>Perspective</th>
<th>Objectives</th>
<th>Measures</th>
<th>Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Impact</td>
<td>• Improve prospects of low income youth</td>
<td>• CM Effectiveness Measure</td>
<td>• 50%</td>
</tr>
<tr>
<td></td>
<td>• Impact tomorrow’s low-income youth</td>
<td>• Results of Studies</td>
<td>• Better than not</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Alumni Career Choice index</td>
<td>• 50% in Ed.</td>
</tr>
<tr>
<td>Constituent</td>
<td>• Engaged corps members</td>
<td>• Percent Satisfaction</td>
<td>• 75%</td>
</tr>
<tr>
<td></td>
<td>• Motivated alumni</td>
<td>• Engagement Index</td>
<td>• 66%</td>
</tr>
<tr>
<td>Internal Operations</td>
<td>• Grow corps member base</td>
<td>• Number of Applicants</td>
<td>• 20% growth</td>
</tr>
<tr>
<td></td>
<td>• Enhance corps member effectiveness</td>
<td>• First Review Accuracy Percentage</td>
<td>• 90%</td>
</tr>
<tr>
<td></td>
<td>• Catalyze alumni movement</td>
<td>• % of alumni attending events</td>
<td>• 50%</td>
</tr>
<tr>
<td>Financial</td>
<td>• Grow and diversify revenue base</td>
<td>• Total Revenue</td>
<td>• $XXX,XXX</td>
</tr>
<tr>
<td></td>
<td>• Good financial management</td>
<td>• # HNW Individuals contributing</td>
<td>• 100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cost per CM</td>
<td>• 20% less</td>
</tr>
<tr>
<td>Organizational</td>
<td>• Diverse Team</td>
<td>• % of staff Diversity</td>
<td>• 40%</td>
</tr>
<tr>
<td>Capacity</td>
<td>• Effective Managers</td>
<td>• % of key goals met</td>
<td>• 90%</td>
</tr>
<tr>
<td></td>
<td>• Technical Capability</td>
<td>• Staff Satisfaction with Technology</td>
<td>• 80%</td>
</tr>
<tr>
<td></td>
<td>• National Board</td>
<td>• $ raised through board members</td>
<td>• $XXX,XXX</td>
</tr>
<tr>
<td></td>
<td>• Expansion Plan</td>
<td>• # new sites</td>
<td>• 4</td>
</tr>
</tbody>
</table>
What Does a Good Strategy Review Meeting Really Look Like?

- Start with a map or theme as the agenda
- Review the problem areas
- Drill into objectives for a complete view
- Review the issue
- Typical decisions
What Does a Good Strategy Review Meeting Really Look Like?

1. Start with a map or theme as the agenda
2. Review the problem areas

<table>
<thead>
<tr>
<th>Objective</th>
<th>Measure</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Profile</td>
<td># of Students</td>
<td>County Growth Projections</td>
</tr>
<tr>
<td></td>
<td>Daily Attendance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meal Assistance</td>
<td></td>
</tr>
<tr>
<td>Highly Qualified Teachers</td>
<td>% classes taught by Highly Qualified Teachers</td>
<td>Community Teachers</td>
</tr>
<tr>
<td></td>
<td>Teacher Qualifications</td>
<td>Teacher Rotation Program</td>
</tr>
<tr>
<td>Adequate Yearly Progress</td>
<td>Reading Component of SRMT</td>
<td>Graduate to College</td>
</tr>
<tr>
<td></td>
<td>Participation in State Reading and Mathematics Test</td>
<td>Rewrite the Reading Curriculum</td>
</tr>
<tr>
<td>Fiscal Responsibility</td>
<td>Balanced Budget</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Local Revenue</td>
<td></td>
</tr>
</tbody>
</table>

- Improve Prospects of Low-Income Youth
- Impact Tomorrow's Low-Income Youth
- Engaged Corp Members
- Motivated Alumni
- Grow Corps Member Base
- Enhance Corps Member Effectiveness
- Catalyze Alumni Movement
- Grow and Diverse Revenue Base
- Good Financial Management
- Diverse Team
- Effective Managers
- Technica l Capacity
- National Board
- Expansion Plan
What Does a Good Strategy Review Meeting Really Look Like?

3. Drill into objectives for a comprehensive view
   - Review the Measure
   - Review Initiatives
   - Evaluate the Objective
What Does a Good Strategy Review Meeting Really Look Like?

3. Drill into objectives for a comprehensive view
   - Review the Measure
   - Review Initiatives
   - Evaluate the Objective
Use measures to analyze and adapt your strategy

Our measure dropped!! Why?

1. The drop is coming from a particular population (7th and 8th Grade)

2. We changed our teaching style to meet new standards

We need new teacher training for middle school math teachers
Measures from ARL StatsQUAL®

StatsQUAL® is a gateway to library assessment tools that describe the role, character, and impact of physical and digital libraries. Through StatsQUAL®, libraries gain access to a number of resources that are used to assess library’s effectiveness and contributions to teaching, learning, and research. StatsQUAL® presents these tools in a single powerful interactive framework that integrates and enhances data mining and presentation both within and across institutions.

- **ARL Statistics™**
  ARL Statistics™ is a series of annual publications that describe the collections, expenditures, staffing, and service activities for ARL member libraries.
  - Visit ARL Statistics™

- **LibQUAL+®**
  LibQUAL+® is a rigorously tested Web-based survey that libraries use to solicit, track, understand, and act upon users’ opinions of service quality.
  - Visit LibQUAL+®

- **DigiQUAL®**
  The DigiQUAL® project is modifying and repurposing the existing LibQUAL+® protocol to assess the services provided by digital libraries.
  - Visit DigiQUAL®

- **MINES for Libraries®**
  MINES for Libraries® is an online transaction-based survey that collects data on the purpose of use of electronic resources and the demographics of users.
  - Visit MINES for Libraries®

- **ClimateQUAL®**
  ClimateQUAL®: Organizational Climate and Diversity Assessment is an assessment of library staff perceptions concerning (a) their library’s commitment to the principles of diversity, (b) organizational policies and procedures, and (c) staff attitudes.
  - Visit ClimateQUAL®
Measures

- Is your strategic plan strategic? Yes this is a repeat.
- “What we do cannot be measured!”
- Do your measures measure something real?
- Words are lovely but how are you going to graph that?

Liz Mengel
Measures – Coming into Focus

- McMaster has 25 measures
- Many “1st generation” measures
- Many adjustments before picture comes into focus
- Mostly new (only one ARL survey item)
- Data being released internally and externally following review by Leadership Group

Vivian Lewis
UW Measures 2009-10

- Selected key priorities from 2006-10 plan for “dry run”
- Used a mix of ongoing usage data, survey data and new data collection
- Examples include input, output and outcome metrics
- No more than 15 measures for 12 key objectives

Steve Hiller
# Examples of UW Measures/Indicators

<table>
<thead>
<tr>
<th>Objective Category</th>
<th>Measure</th>
<th>Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CUSTOMER OBJECTIVES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I.A. Strengthen library role in undergraduate learning</td>
<td>UW Libraries involvement in undergraduate learning</td>
<td>70% of undergraduate programs have library involvement</td>
<td>2009: 52%</td>
</tr>
<tr>
<td>I.B. Reshape library spaces to enhance user experiences</td>
<td>Use of physical library space</td>
<td>&gt;4 million gate count entrants annually</td>
<td># in mill. FY09 4.27 FY10 4.54</td>
</tr>
<tr>
<td>I.C. Expand delivery services</td>
<td>Number of items borrowed/delivered from other libraries</td>
<td>Top 15% of ARL libraries</td>
<td>FY 08 rank #2</td>
</tr>
<tr>
<td><strong>FINANCIAL OBJECTIVES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>II.A. Demonstrate library contribution to research productivity</td>
<td>UW Libraries contribution to faculty and grad research productivity (survey)</td>
<td>Contribution to faculty &amp; grad research =&gt;4.5</td>
<td>Fac Grad 2007 4.56 4.26 2010 4.63 4.64</td>
</tr>
<tr>
<td><strong>INTERNAL OBJECTIVES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>III.A. Communicate library services, resources and value</td>
<td>Visibility of librarian liaisons to faculty and graduate students (survey)</td>
<td>=&gt;60% of faculty and graduate students rate satisfaction with liaison</td>
<td>Fac Grad 2007 59% 48% 2010 62% 59%</td>
</tr>
<tr>
<td>III.C. Optimize organizational performance</td>
<td>Cost effectiveness of online journal subscriptions</td>
<td>Article download cost &lt;$3.00</td>
<td>2008 $2.04</td>
</tr>
<tr>
<td>III.D. Provide access to information resources for world class TLR</td>
<td>UW Libraries collections support work (survey)</td>
<td>Collections satisfaction =&gt;4.25 for all groups</td>
<td>Fac Grad UG 2007 4.45 4.31 4.29 2010 4.56 4.46 4.31</td>
</tr>
</tbody>
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Metrics and Indicators
What UW Learned

• Define outcomes before developing measures
• Balance existing data use with new data collection
• Mix cyclical and ongoing data
• Strategy drives metrics
• Less may be more: don’t be “over-metricated”!
Engaging Staff (JHU)

- How many managers can dance on a strategy map?
- Building from the bottom up or top down?
- Now that you built it, will they come?
- Staff - finding their place on the strategy map

Liz Mengel
Engaging Staff (McMaster)

- November 2010: Staff Strategy Fair
  - thunder talks
  - strategic initiative walk-about

- December 2010: Metrics Workshops
  - roundtable reviews of available data

Vivian Lewis
# McMaster’s Scorecard / Strategic Plan Calendar

<table>
<thead>
<tr>
<th></th>
<th>Leadership Reviews User Perspective - Round 1</th>
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<tbody>
<tr>
<td><strong>September</strong></td>
<td>Leadership Reviews Internal Process Perspective – Round 1</td>
</tr>
<tr>
<td><strong>October</strong></td>
<td>Leadership Reviews Learning &amp; Growth Perspective – Round 1</td>
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<tr>
<td><strong>November</strong></td>
<td>Leadership Reviews Financial Perspective – Round 1</td>
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<tr>
<td><strong>December</strong></td>
<td>Leadership Reviews User Perspective – Round 2</td>
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<tr>
<td><strong>January</strong></td>
<td>Leadership Reviews Internal Process Perspective – Round 2</td>
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<tr>
<td><strong>February</strong></td>
<td>Leadership Reviews Learning &amp; Growth Perspective – Round 2</td>
</tr>
<tr>
<td><strong>March</strong></td>
<td>Leadership Reviews Financial Perspective – Round 2</td>
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<tr>
<td><strong>April</strong></td>
<td><strong>Staff Workshops – Objectives, Measures, Initiatives</strong></td>
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<td><strong>May / June</strong></td>
<td>Leadership Review of Strategic Plan / Scorecard</td>
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<tr>
<td><strong>July</strong></td>
<td><strong>All Staff Meeting – Strategic Plan / Scorecard Annual Update</strong></td>
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<tr>
<td><strong>August</strong></td>
<td>VACATION TIME!</td>
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</table>
Managing the Process at UW

- Staff looked to the Cabinet for vision and leadership
- Utilized existing opportunities and venues for input & strategy development
- Began periodic strategic conversations and discussion open to all staff
Integrating Strategy with Planning, Operations and Assessment at UW

- Convergence of strategic planning & assessment
- Groups/areas most directly involved with key objectives develop outcomes, actions & metrics
- Cabinet oversees process with Strategic Planning and Assessment & Metrics groups tracking progress
- Strategy Map and Scorecard used to frame and communicate “Building Sustainable Futures” for both internal and external audiences
Betsy Wilson, U. Washington

- 2Y2D, ABB, PEI, 0EI, WDDIM
- Strategy
- Mapping
- Metrics
- Value
- Storytelling

“Yeah, yeah, I get it”
2011 ARL Scorecard Initiative

• Call for participation for a new cohort of libraries for a collaborative community based project

• For libraries interested in engaging with ARL and Ascendant in 2011-2012 to develop their strategy

• If interested, please contact Martha Kyrillidou at martha@arl.org