

Library value:
*emergence from future scenarios,
and the relationship to transcendent value*

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Summary

- Understanding value and impact measurement
- The Library future value proposition emerging from scenario planning
- The development of a value scorecard which demonstrates transcendent value

Forming strategy

- Rational/Classical
 - In the West increasingly shorter term
 - Generally increasingly economic
- Emergent/Scenario
 - Deals with uncertainty by offering options
 - May assist organisational vision more effectively
 - Helpful in public sector

Limited planning horizons?

Dealing with the immediate or medium term

eg UK context:

- Student fees increases
- Research Excellence Framework 2014
- Enhanced services at lower costs due to economic crisis

From UCISA-CISG 'Brave New World'

Scenario Planning in Libraries

- In use since mid '90s
- US & UK Health Libraries
 - “Knowledge Animal” for future Health Librarian
- Various academic libraries
 - Reading University Library
- Academic Library collective organisations
 - ARL to 2030
 - SCONUL to 2050

“Each scenario has a gap where the library can fill itself in”

ARL 2030 Scenarios

Effective Library Planning

- Ensure “learning organisation” approaches
 - Self reliance; ‘masters of our own destiny’
 - Shared vision and mental models
 - Systems thinking and coherence
- Combine formal planning with opportunistic (and crisis) driven emergent strategy
- Allocate resources accordingly
- Requires effective change management methods

A QUEST FOR VALUE MEASUREMENT

Recent work on impact & value

- SCONUL/LIRG Impact initiative (2003-05)
- SCONUL VAMP initiative (2005-)
- 8th Northumbria paper (2009)
- IMLS LibVALUE project (2010-)
- ACRL's 'Value of academic libraries' (2010)
- 3rd LAC paper (2010) see *Library Quarterly*
- Neal's "polemic" and return to "virtues" (2011)

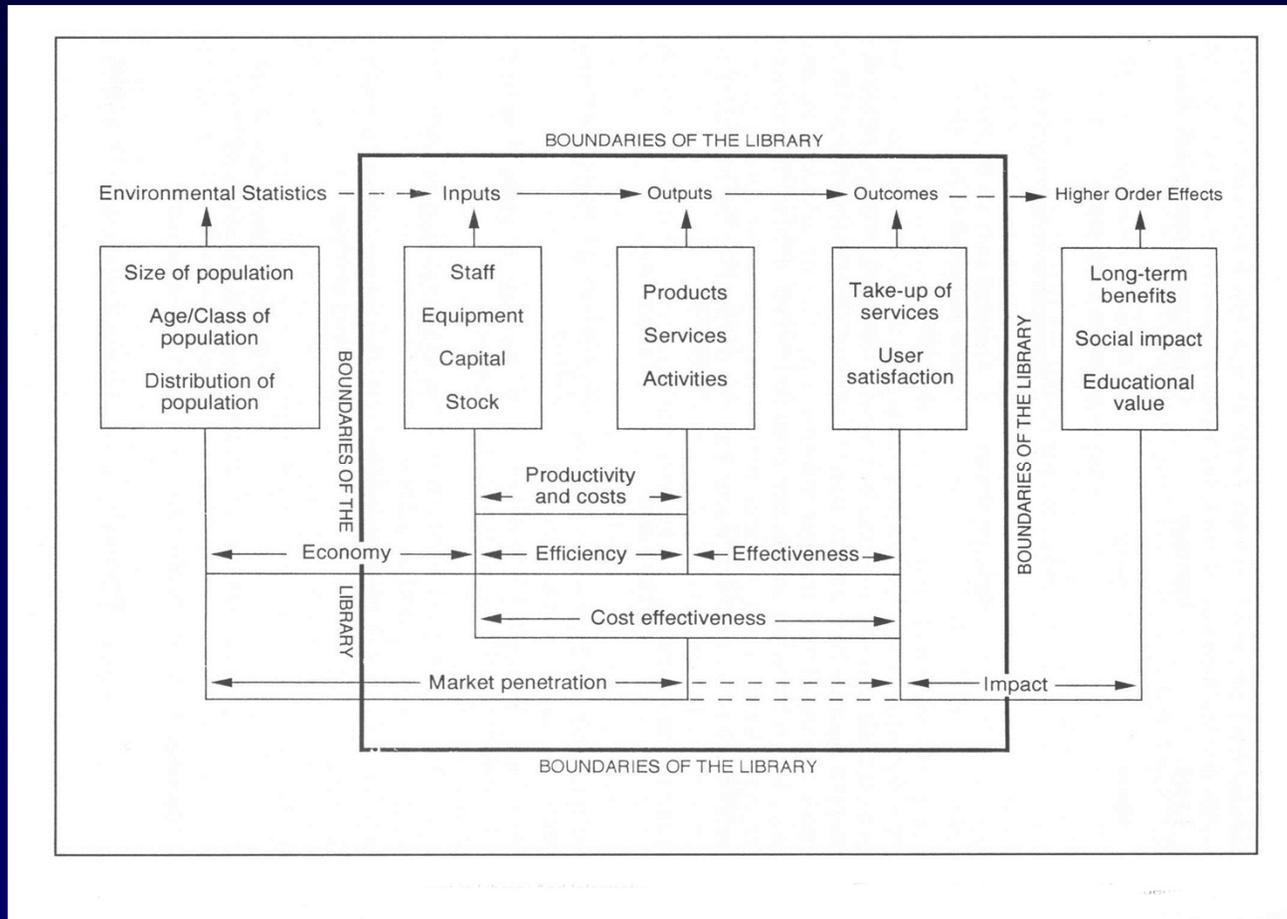
The Arguments *(see Library Quarterly)*

- Cross-pressures and failure to prove worth
- Worth is about value (and impact)
- The value sought is **transcendent**
- Library assessment has been about (mainly) quality rather than value
- Value is linked to **values**
- Values provide the key and route to proof of worth

Consequences for the quest

- Measurement moves outside the 'black box'
- Values are the starting point
- Economic value is only one aspect
- Institutional values will be helpful, but some transcendent value may go beyond the institution, as the aim of the academy is itself transcendent

Transcendence: beyond the black box



Abbott, Christine (1994). *Performance Measurement in Library and Information Services*. London: Aslib, The Association for Information Management. p19.

The Transcendent Library

The transcendent library is one in which the value can be judged beyond immediate needs and demands, through contribution to less concrete aspects of institutional or societal intent

Consequences for measurement

- More related to institutional intent
- More about intangible benefits
- More about a coherent and holistic picture
- About what leads to valuable performance rather than quantifying value measures
 - Operationalising common good/social goals

INSTITUTIONAL SCENARIOS AND CONSEQUENT VALUES

ARL Scenarios 2030



- What values are assumed in the scenarios?
- How does this link to value?
- What is the resulting library value proposition?

Value proposition analysis

- Overarching cultural values
- Consequences for value-added in:
 - Content
 - People
 - Relationships
 - Relevant services
- An ‘organism/persona’ vision for the future Library?

Scenario 1: Research Entrepreneurs



- Competition and outsourcing
- Information value high
- Personality cult relationships
- Linking stores and discovery

Scenario 2: Reuse and Recycle



- Collaboration
- Information value low
- Relationships across groups
- Research management and professional training

Scenario 3: Disciplines in Charge



- Specialised Universities
- Data stores high value
- Political skills valued
- Research information decoupled & disaggregated

Scenario 4: Global Followers



- End of Western hegemony
- IP loser?
- Relations with East critical
- Global communal library?

SCONUL Library Scenarios 2050

Axes:

- Open or Closed
- Market or State

Society/HE Values
HE provision

Resulting scenarios

- ‘Beehive’: Open/State
- ‘Wild West’: Open/Market
- ‘Walled Garden’: Closed/Market
- *Discarded* Closed/State

Characterisations

Beehive

*Community good;
state control*

Wild West

*Competition;
consumers*

Walled Garden

*Insularity;
information
protection*

Some measurement conclusions ...

- Assumptions of elites throughout
- Assumptions of competition throughout
- Assumptions of quality throughout
- Assumptions about values variable
- Assumptions about *locus* variable
- Assumptions about work psychology variable

Some conclusions for value ...

- Value likely to be a differentiating factor in preparing for success (change and strategy)
- Change will be rapid and mitigation will be difficult
- Quality will be a constant requirement
- Value measurement needs to assume greater import alongside quality

BUILDING A VALUE SCORECARD

Consequences for measurement (again)

- More related to institutional intent
- More about intangible benefits
- More about a coherent and holistic picture
- About what leads to valuable performance rather than quantifying value measures
 - Operationalising common good/social goals

Values and Value measurement

- Value measurement must be linked to values
- Value measures cannot be chosen until the values set is agreed
- Institutional values statements are one current key source for considering value
- These may lack what arises from the scenario analyses

Conclusions

- Traditional value measure tools will only provide a partial answer
- Some economic value tools may only reflect instrumental aspects
- Value requires assessment of more intangible benefits

A possible institutional set (U of York)

- Excellence
- Internationalisation
- Inclusivity
- Sustainability

A potential Library set (U of York)

- **Service**

- Customer focus
- Welcoming and stimulating environment for L & R

- **Scholarship**

- Collaboration with academic partners
- Committed to supporting L & R in self and others

A potential Library set (U of York)

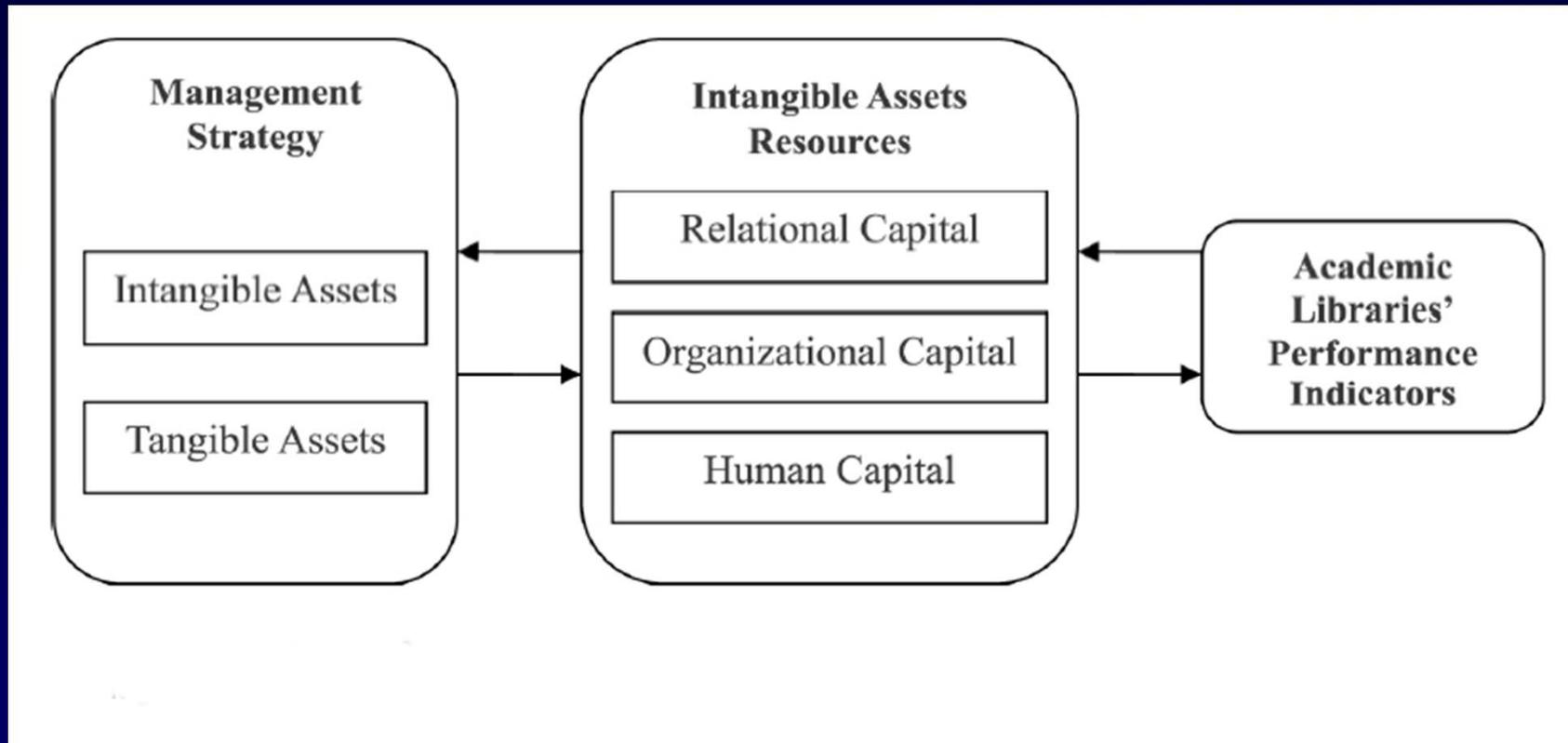
- **Style**

- Continuous improvement through creativity and innovation
- Openness, honesty and inclusivity in communication

- **Respect**

- Promotion of equality of opportunity
- Respect for each other and for individual contributions

Unmeasured assets?



Petros A. Kostagiolas & Stefanos Asonitis. (2009). Intangible assets for academic libraries. *Library Management*. 30 (6/7), p425.

Corrall & Sriborisutsakul

Indicators for:

- Human
- Structural
- Relational
- Collections and service

assets linked to institutional objectives

An expression of the full worth of the academic research library

A VALUE SCORECARD

The Value Scorecard

Dimension 1: *Relational Capital*

- Competitive position capital
 - Reputation
 - Reach
- Relational capital
 - External relationship development
 - Internal institutional relationship development

The Value Scorecard

Dimension 2: *Library Capital*

- Tangible capital
 - Collections
 - Environments
 - Services
- Intangible capital
 - Intangible assets formed around the above (meta-assets)
 - Organizational capital
 - Human capital

The Value Scorecard

Dimension 3: *Library Virtue*

- Social Capital developed beyond the Library
 - Contribution to research
 - Contribution to learning
 - Contribution to employability
 - Contribution to professional and vocational intent
 - Contribution to inclusivity
 - Contribution to other common goods

The Value Scorecard

Dimension 4: *Library Momentum*

- Capital saved or gained by progress
 - Capital assets developed early
 - Facilitation of research capital
 - Facilitation of learning capital
 - Facilitation of quality
 - Capital saved by sustainability

Comparison with Balanced Scorecard

- **Financial** - broadened to capital development of all kinds
- **Process** - broadened to capital development intent
- **Customer** - beyond immediate satisfaction
- **Learning** - fundamental to human capital development but requires focus on intent

Tests 1?

- Transcendent?
- Values linked?
- Cultural and Behavioural effect?
- Coherent and full?

Tests 2?

- Strategic relevance?
- Institutional relevance?
- Societal relevance?
- Necessary *and* sufficient?
- Balanced *or* choice of imbalance?

Conclusions and Questions

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