

Making Value Measurement a Reality:
Implementing the Value Scorecard

J. Stephen Town

Director of Information & University Librarian

University of York, UK

5th Library Assessment Conference

Wednesday 6th August 2014

‘Industria et Sudor’

INTRODUCTION

The 600th Anniversary of the York Library

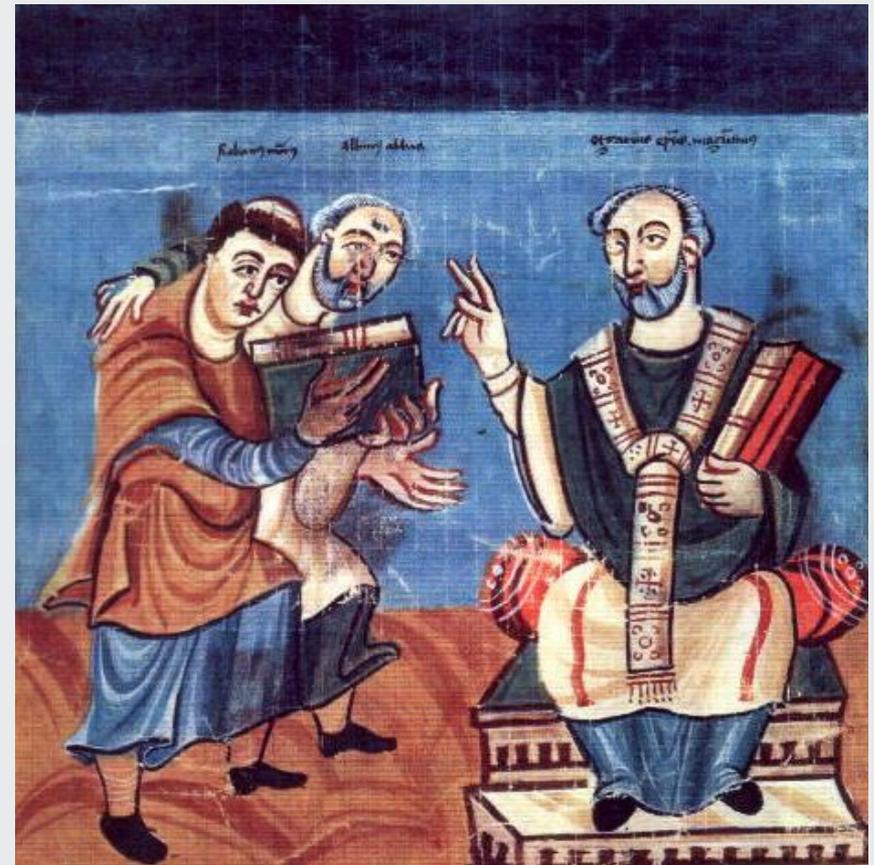


The 1414 Library, York Minster



“per bonam et
deuotissimam magistri
mei **industriam** uel etiam
mei ipsius qualecumque
sudorem”

Alcuin of York



[The library was assembled]:

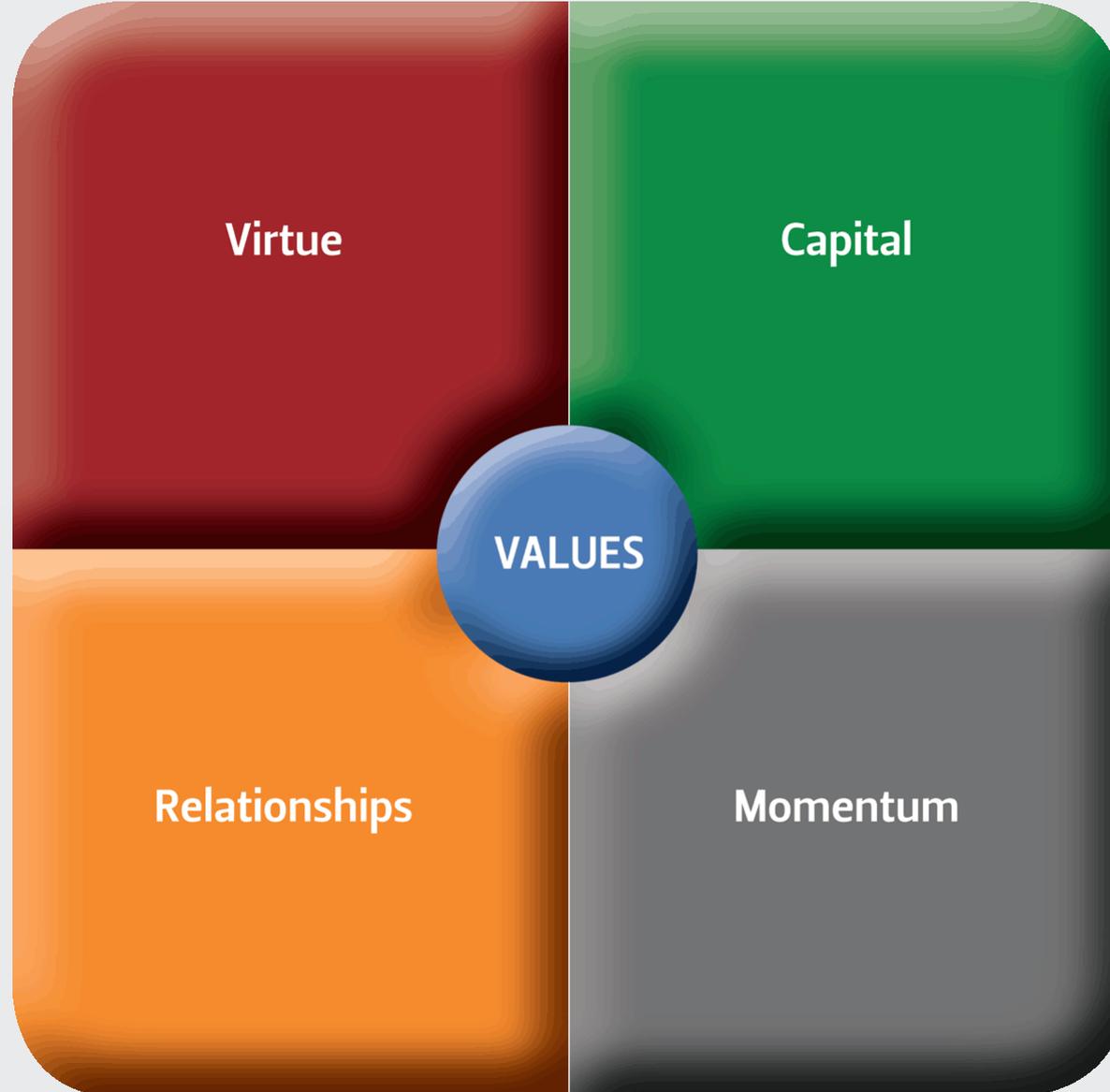
“by the good and most devoted industry of my magister and also by some of my own perspiration”

“industria should be translated as **‘by his own good and most devoted plan,’** and sudor is **sweat, the perspiration of the copyist’s heavy toil.**”

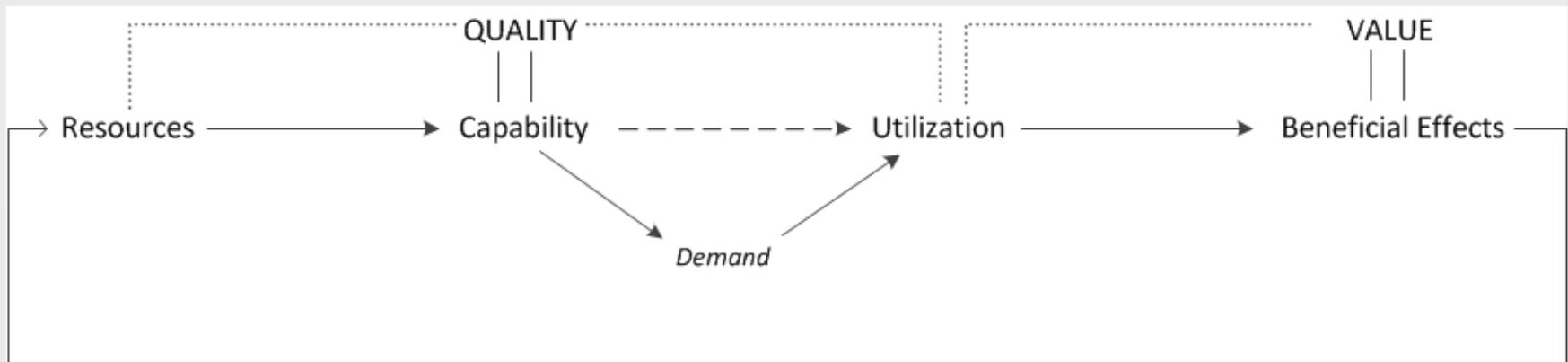
Dr Mary Garrison, University of York

- Capturing transcendent value
- A Scorecard update (the “industry”)
 - The relationship to the Balanced scorecard
- An implementation case (the “sweat”)
- Further work

The Value Scorecard

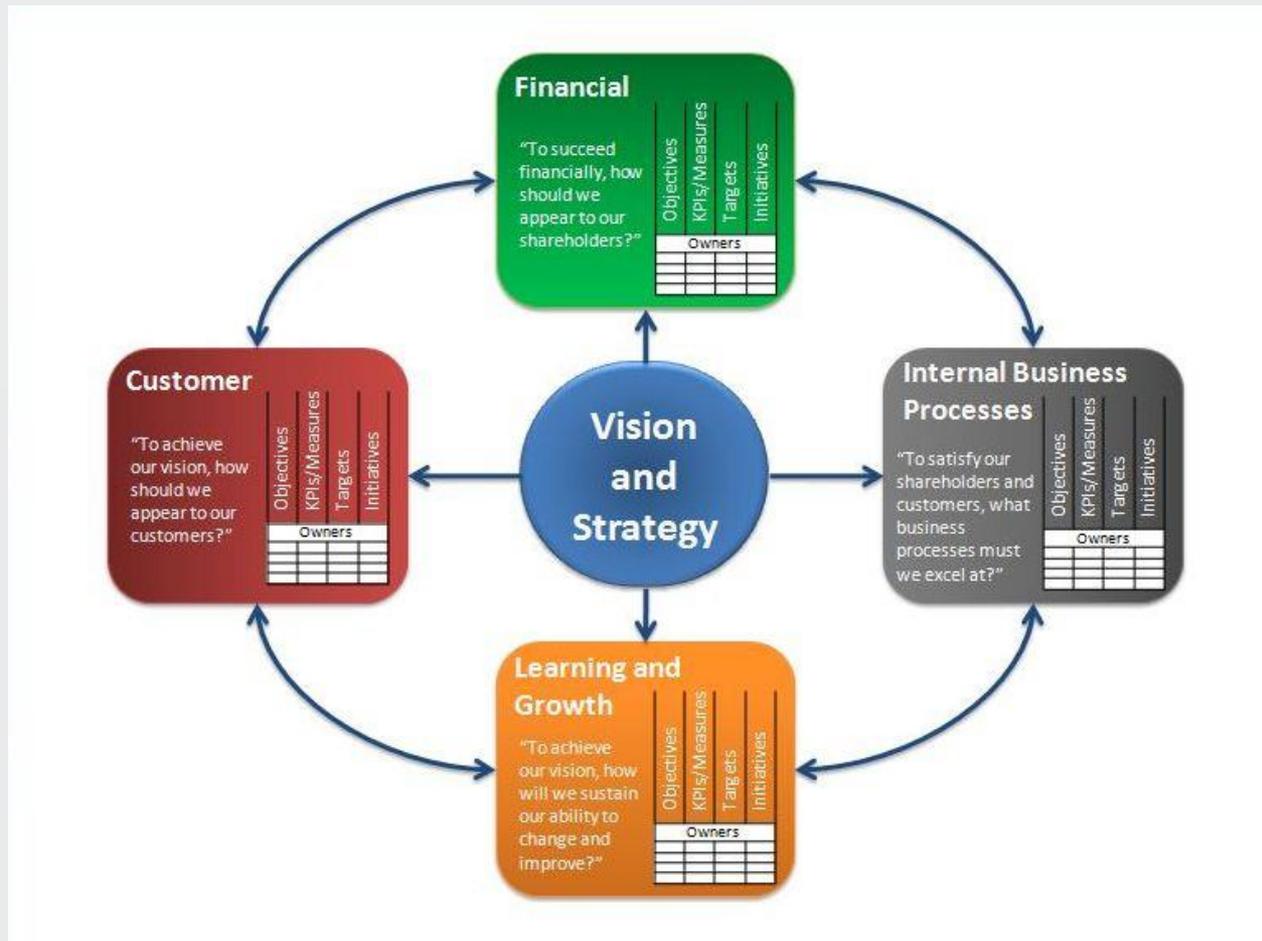


The distinction between Quality and Value

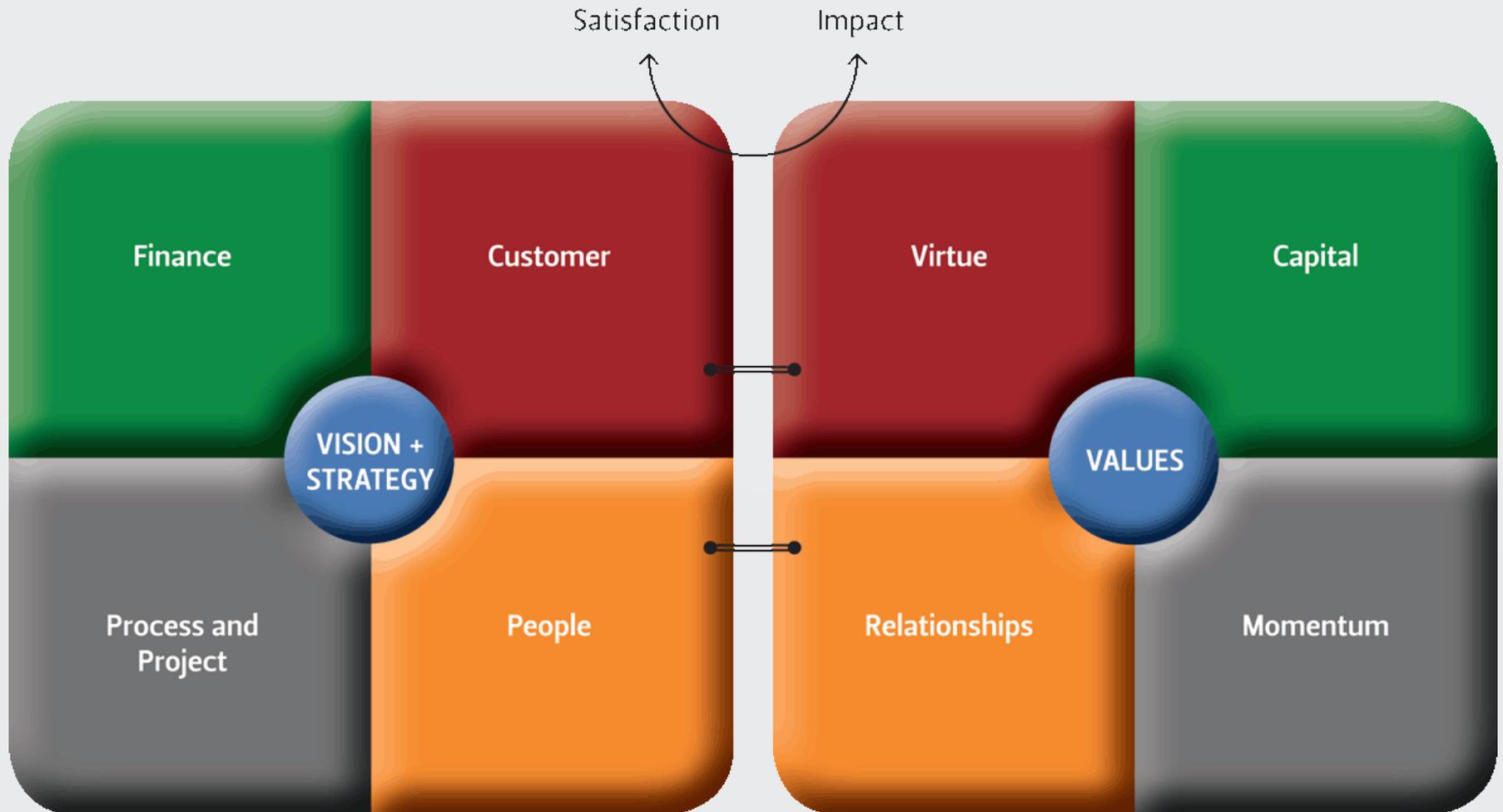


R. H. Orr. (1973). MEASURING THE GOODNESS OF LIBRARY SERVICES: A GENERAL FRAMEWORK FOR CONSIDERING QUANTITATIVE MEASURES. *Journal of Documentation*. 29 (3), p318.

The Balanced Scorecard



Value & Balanced Scorecards



Balanced Scorecard

- Balanced
- Simple
- Performance
- Discrete measures
- Single targets
- Direct data

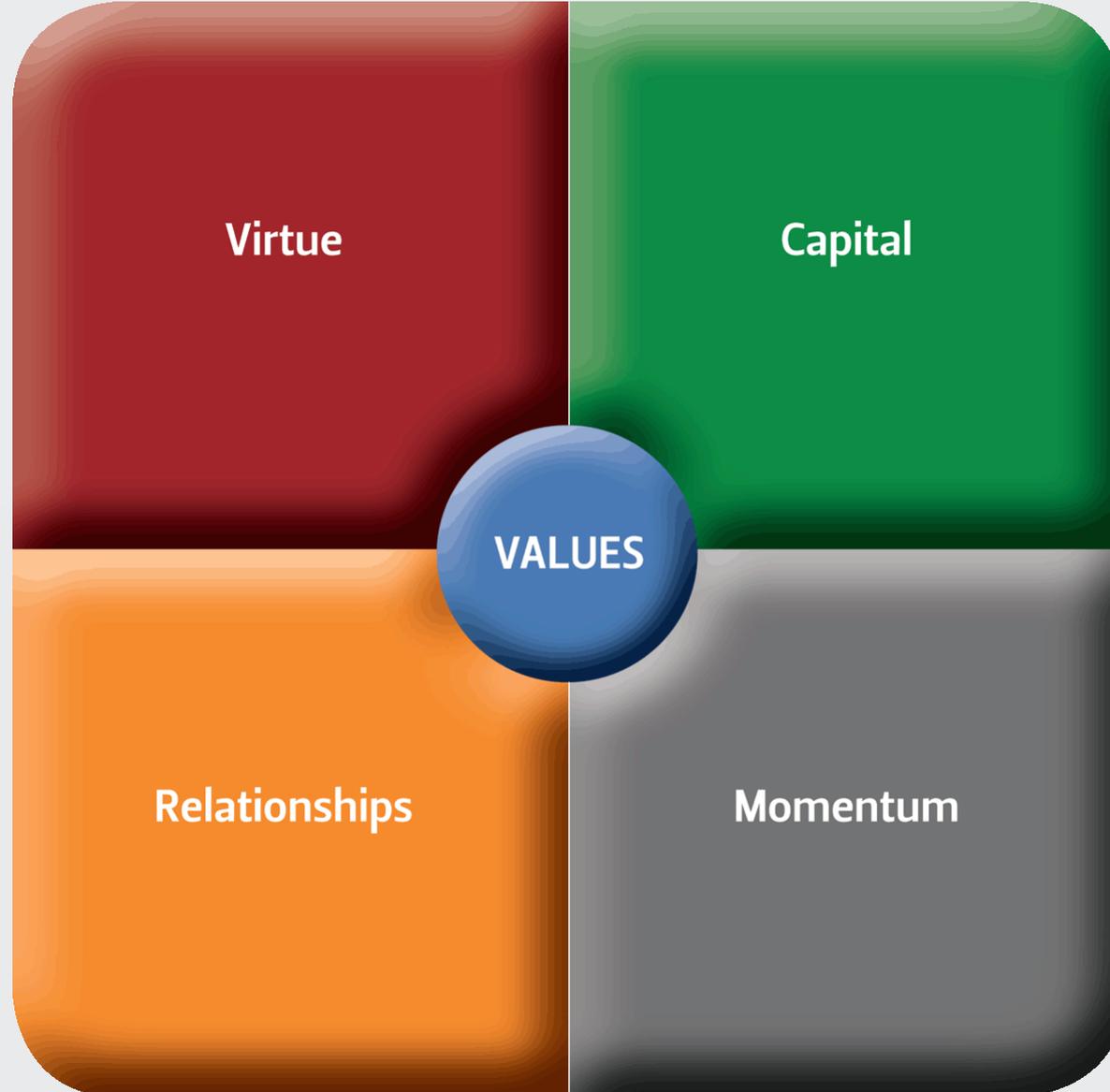
Value Scorecard

- Unbalanced to suit context
- Complex
- Insight & prediction
- Connected
- Correlation aim
- Narrative & advocacy

Industria

SCORECARD COMPONENTS

The Value Scorecard



- **Virtue**

- Impact data
- Correlation between activity data and transcendent effects

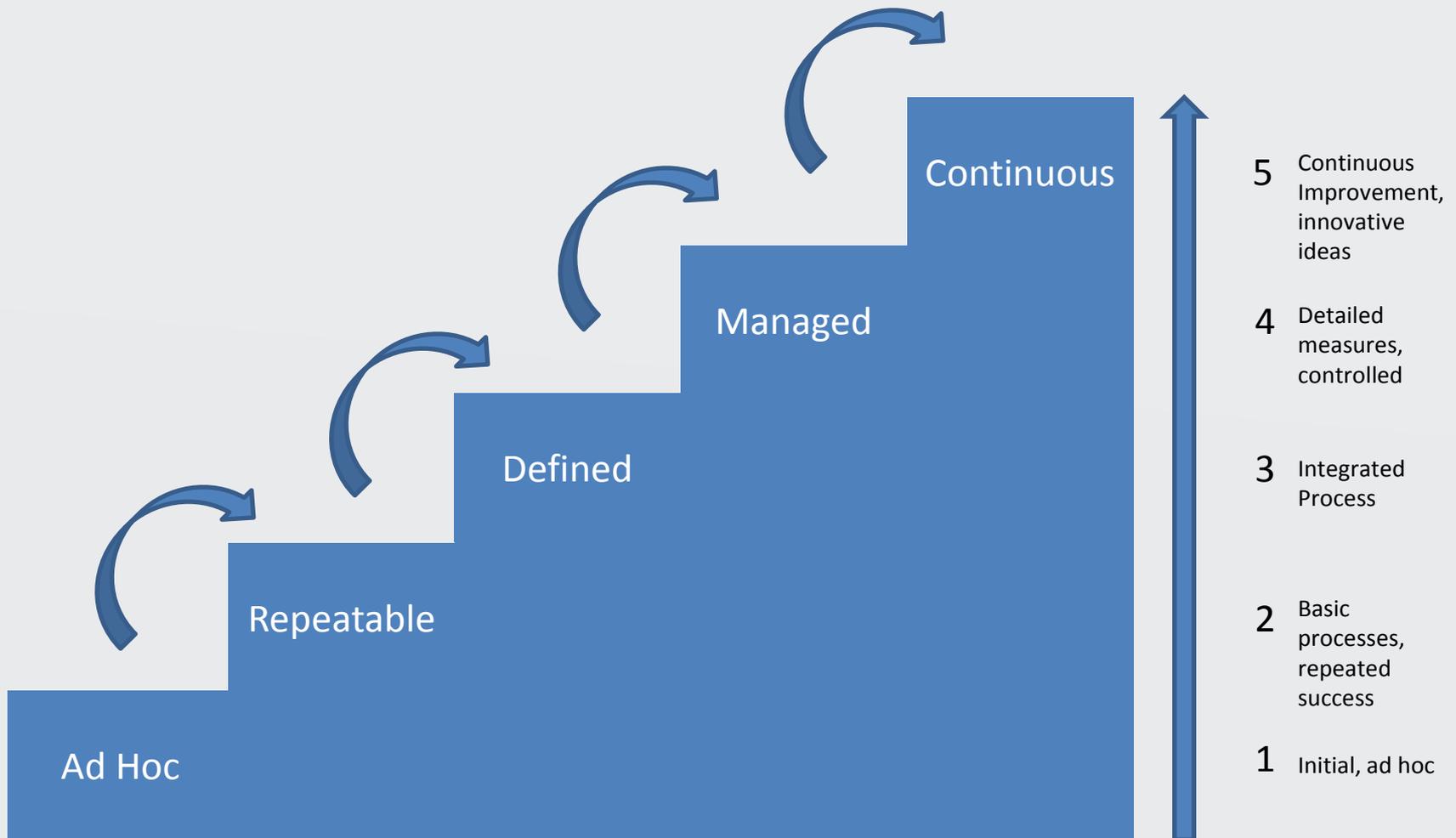
- **Relationships**

- = sum of all relationships
- “Goodwill” value increase assessment
- Relational data (=strength?)
- Correlation between this, direction, activity, impact & capital growth

- **Momentum**

- “= mass x velocity”
- Alignment proof
- Progress data
- Correlation between capital development through projects and time
- Volume , pace, culture, and meta-assessment of organizational capability

Capability Maturity Model



- **Tangible capital**
 - **Collections** value data
 - **Services** value data
 - **Environments** value data
 - Valuation and link to values
 - Correlation between this, and impact, and transcendent effects
- **Intangible capital**
 - **Meta-assets** value data
 - **Organizational** value data
 - **KM & intellectual** value data
 - Correlation between this, and impact & capital growth
- **Human capital**
 - **People** value data
 - Correlation between people data and all other elements

- **Capacity**
- **Capability**
- **Climate of Affect**
- **Culture of Momentum**

Enablers (4 'C's')

- Capacity
 - Minus confounders
 - Absence, turnover
- Capability
 - **Talent**: raw & growth
 - Critical mass
- Climate of Affect
 - **Engagement**
 - Emowerment
- Culture of momentum
 - **Enablement**
 - Programme capability
 - Maturity

Outcome proofs

- Market fit
 - Sustainability
 - Market related impact
- Strategic fit (over time)
 - Quality & Improvement
 - New product development
- Contribution to
 - Productivity
 - Creativity
- Competitive impact
 - Service development
 - Reputational investment

The effective academic library (1995)

Integration

Indicator P1.4 Liaison

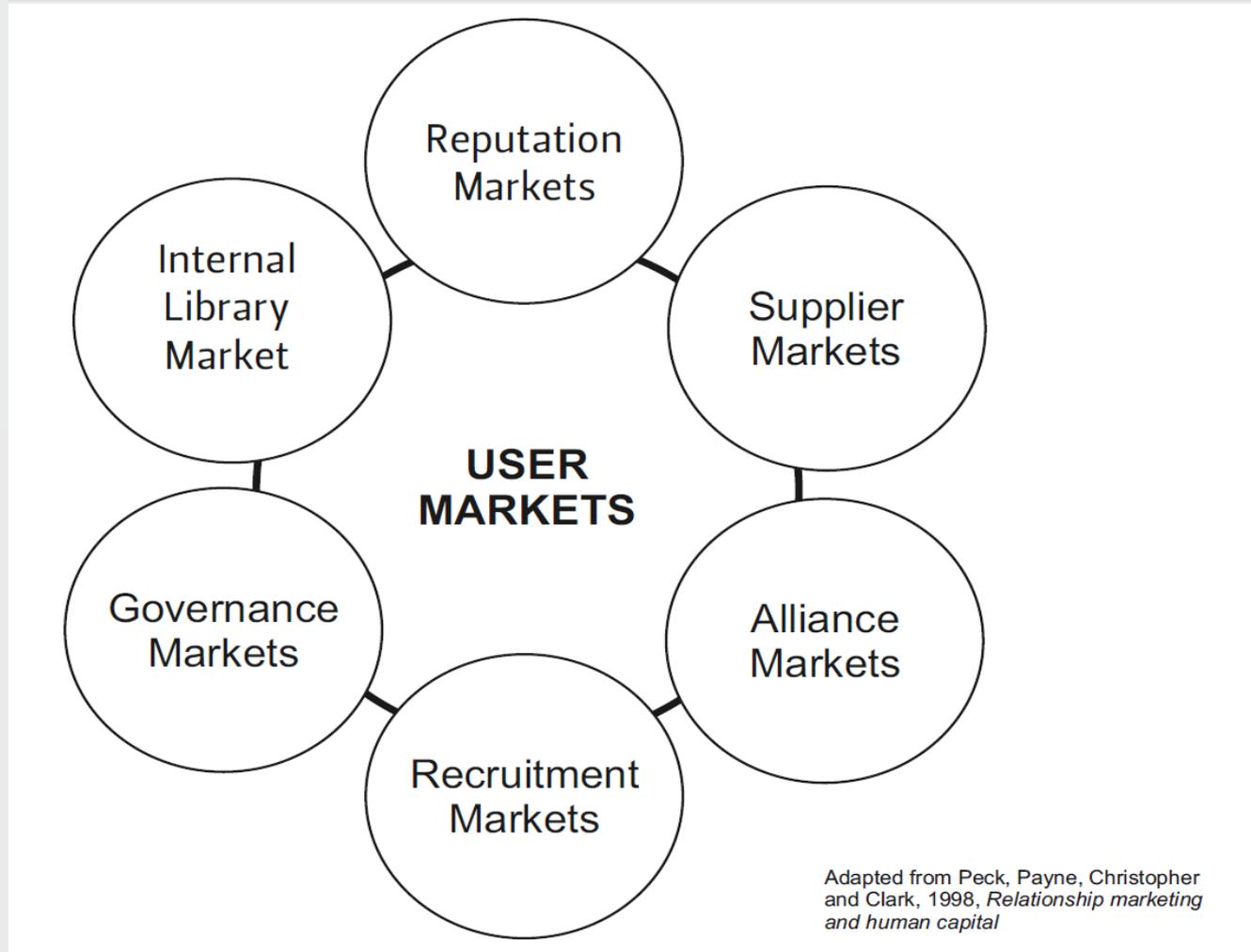
“evidence of formal and informal communications between the library service, the senior management of the institution, academics and students ... to assess the degree of effective and dynamic communication to inform service provision”

Awareness & Fit

- ***Consciousness***
 - General audit of relational spaces (7 market model)
- ***Congruence***
 - Degree of fit of relationship activity to parent institution (gap analysis)

Strength & Process

- ***Communities***
 - Assessment of strength level across all relations
 - CRM data
 - Strength index
- ***Communication***
 - Measures of the process of communication for relationship development
 - Communications audit
 - Down to individual level



Return on relationships

- ***Causality***
 - Specific outcomes of positive relationships on academic process, innovation, finance, quality & staff development
- ***Comeback***
 - Specific ensuing returns to the Library of repeat benefits of relationships
 - Transaction costs saved through Trust

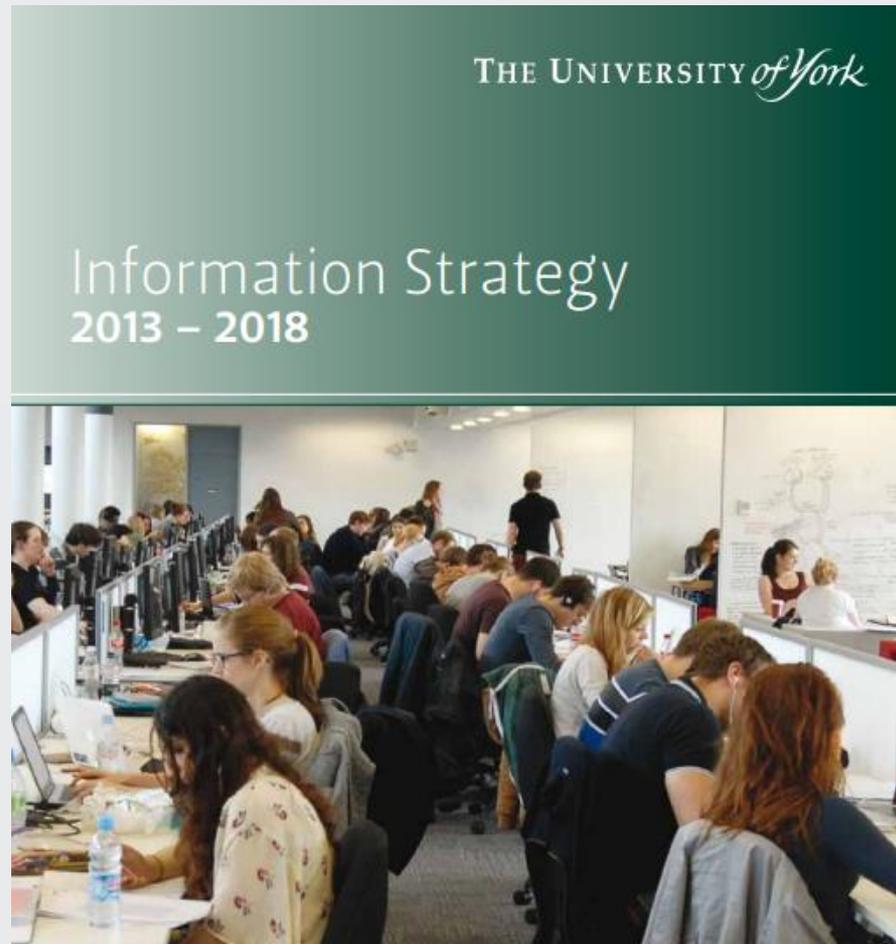
- **Value, Impact and the Transcendent Library.** *Library Quarterly* 81(1). 2011. 111-124.
- **The value of libraries** in Baker & Evans (eds) *Libraries and society*. Chandos, 2011. 303-325.
- **With Kyrillidou, M. Developing a values scorecard.** *Performance Measurement & Metrics* 14(1) 2013. 7-16.
- **The value of people.** *Performance Measurement & Metrics* 15(1) 2014. 67-80.

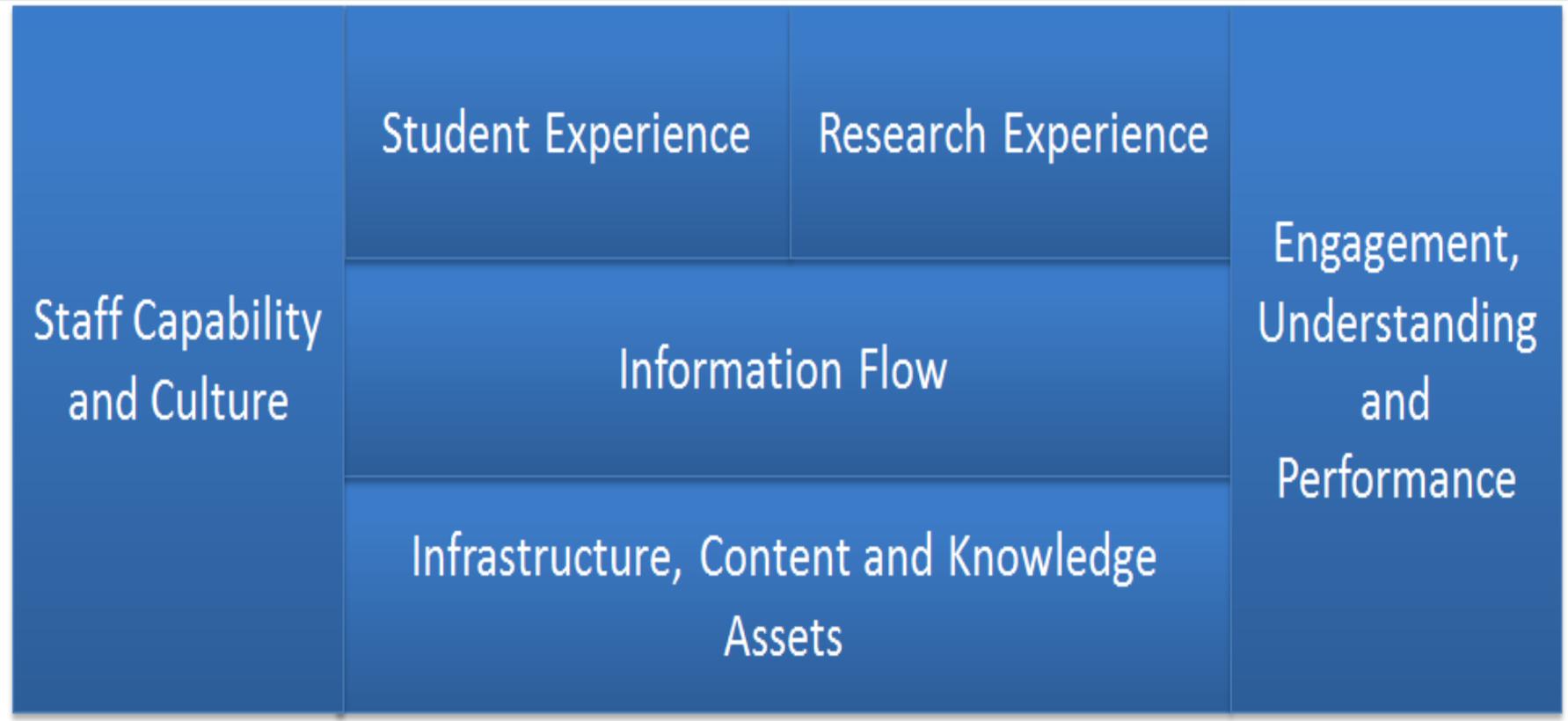
Forthcoming

- **Relationship capital.** *Library Management* 2014.

Sudor

IMPLEMENTATION CASE: PROGRESS AT YORK





1. Meet need satisfaction measures
2. Resource financial measures
3. Innovate new services
4. Engage relational strength
5. Align University fit
6. Risk failure avoidance

THE UNIVERSITY *of York*
Information



Our Values

Customer Focus

We provide excellent services to all our customers (internal and external) and exceed expectations.

Scholarship

We work with the community to add value to research, teaching and learning.

Respect

We value and respect each other, work together with shared purpose, and promote equality of opportunity for all.

Honesty and Transparency

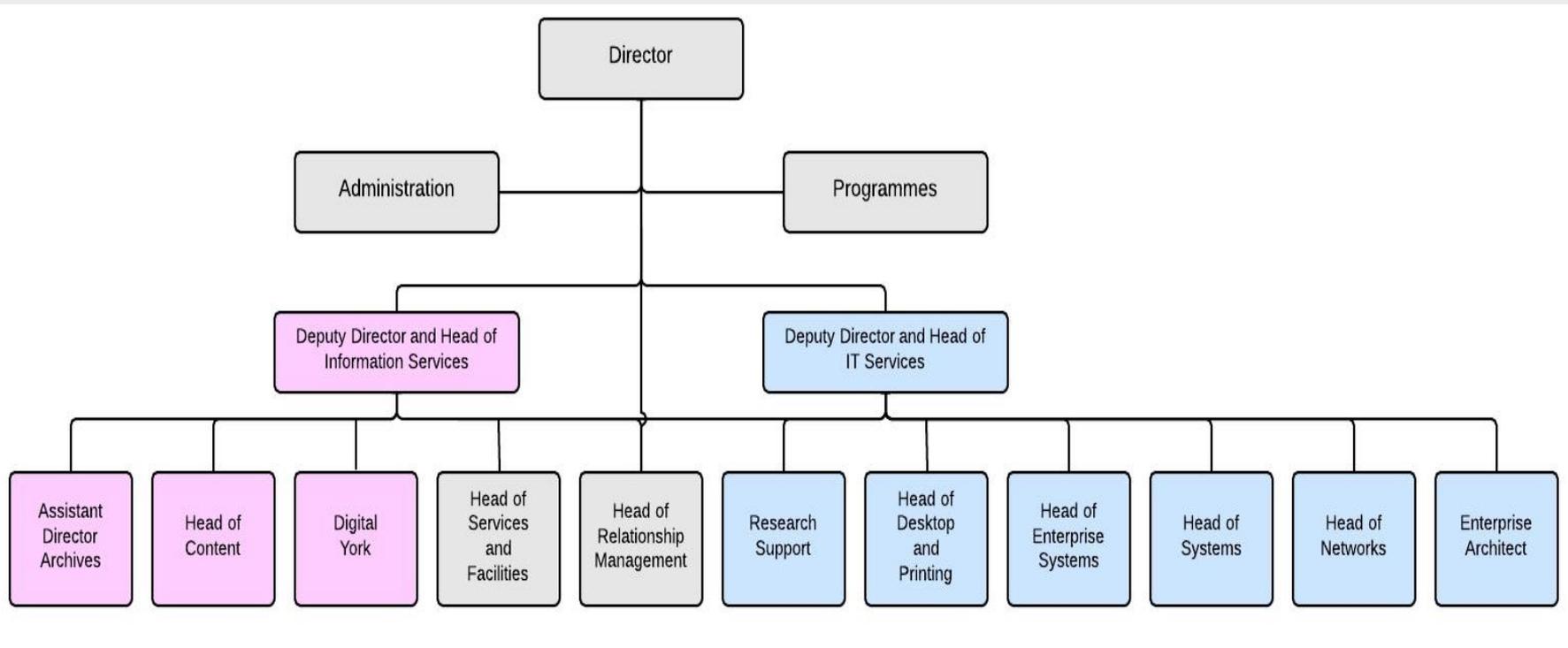
We act with integrity and communicate openly and effectively in an appropriate and receptive style.

Vision, Inspiration and Empowerment

We have a forward thinking culture that maintains and develops a dynamic and flexible service, by encouraging contribution from everyone.

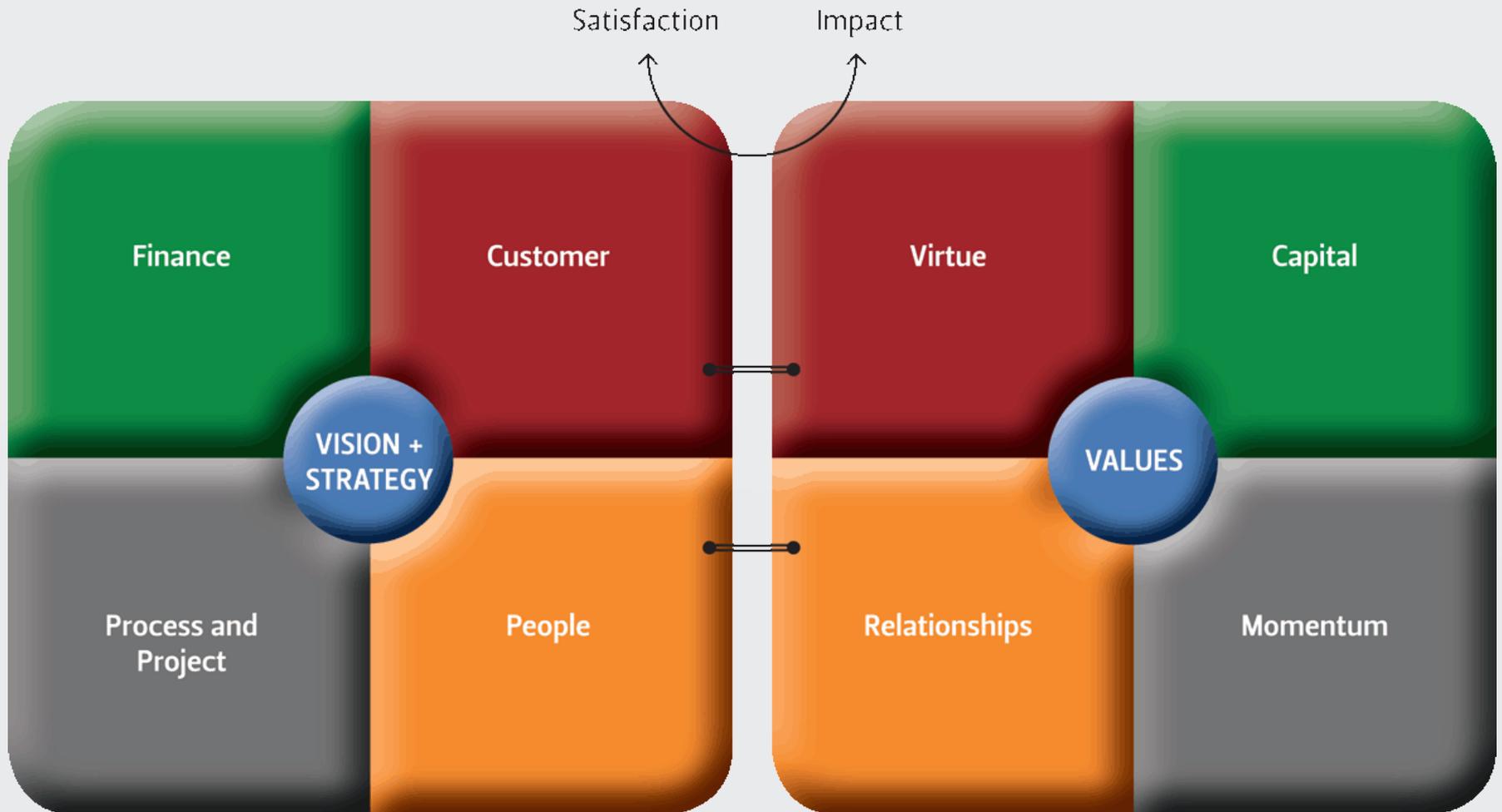
These values were created by Information staff in Summer 2012.

York Information structure



- Service Unit template reporting (Quarterly)
- Internal initiatives
 - Action plans from surveys, feedback, lean
 - Strategy projects
- National & collaborative initiatives & services
 - UK Customer Service Excellence standards (& RLUK)
 - LAMP; CCM; Research data; OA Publications
 - LibQUAL+; TechQUAL; ClimateQUAL
- Corporate data (analytics)
 - HR institutional data; UoY Staff Survey; benchmarks
 - Library and other system data

Value & Balanced Scorecards



Initial Template (BS plus VS)

Information Directorate SMT Performance Template

	Report Categories	Balanced or Value Scorecard Dimension	Measures	Benchmark / Comparator data	Narrative
1	Service	Satisfaction Impact	To be populated with data tables and agreed measures	To be populated with available comparison data, either historic or competitor	<ul style="list-style-type: none"> report on service satisfaction including complaints report impact data, eg effect on Teaching & Learning, Research, Business & Community, Administration or related to University plan report transcendent contributions or outcomes
2	Innovation	Momentum (Projects)			<ul style="list-style-type: none"> report on innovation progress report on project range, completion, and pace report on issues, inhibitors and obstacles
3	Process	Process & process improvement			<ul style="list-style-type: none"> report on BAU processes and variations report on process improvement projects report on efficiency gains delivered
4	Assets and Resources	Finance Capital Assets			<ul style="list-style-type: none"> report financial exceptions and variations report savings achieved report growth / change in asset base, for example infrastructure; content; other; intangibles flag up trends relevant to planning
5	Relational	Relationships			<ul style="list-style-type: none"> report on relationships / engagement /meetings/dialogue report on internal and external partnerships report on supplier partnerships flag up consequences of new relationship requirements
6	People	Human capital Learning & Growth			<ul style="list-style-type: none"> report on new staff <ul style="list-style-type: none"> report on other staffing issues and changes report development activities, individual & collective flag up gaps in capacity or capability

In order to enhance reports further, unit leaders should consider the following:

- **Impact:** What work has impacted upon delivering the core goals of the University?
- **Momentum:** What projects and improvements have been achieved which demonstrate momentum towards the Information Strategy?
- **Process and Process Improvement:** What changes have been made that have made more efficient or effective use of resource?
- **Capital Assets:** What have you purchased/acquired/collected that has increased our overall asset value to the University?
- **Relationships:** What relationships or partnerships have been developed that assist toward strategies?
- **People:** What impact have new starters or training or development had on services?

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VIRTUE

Award assessed:

March 2014

Achieved with two
“Compliance plus”
scores:

*Customer Insight
Delivery*

**CUSTOMER
SERVICE
EXCELLENCE**



“The Directorate values customer engagement highly ... to ensure that customers experience and views are included”

“There are particular strengths about learning from best practice and presenting projects externally...”

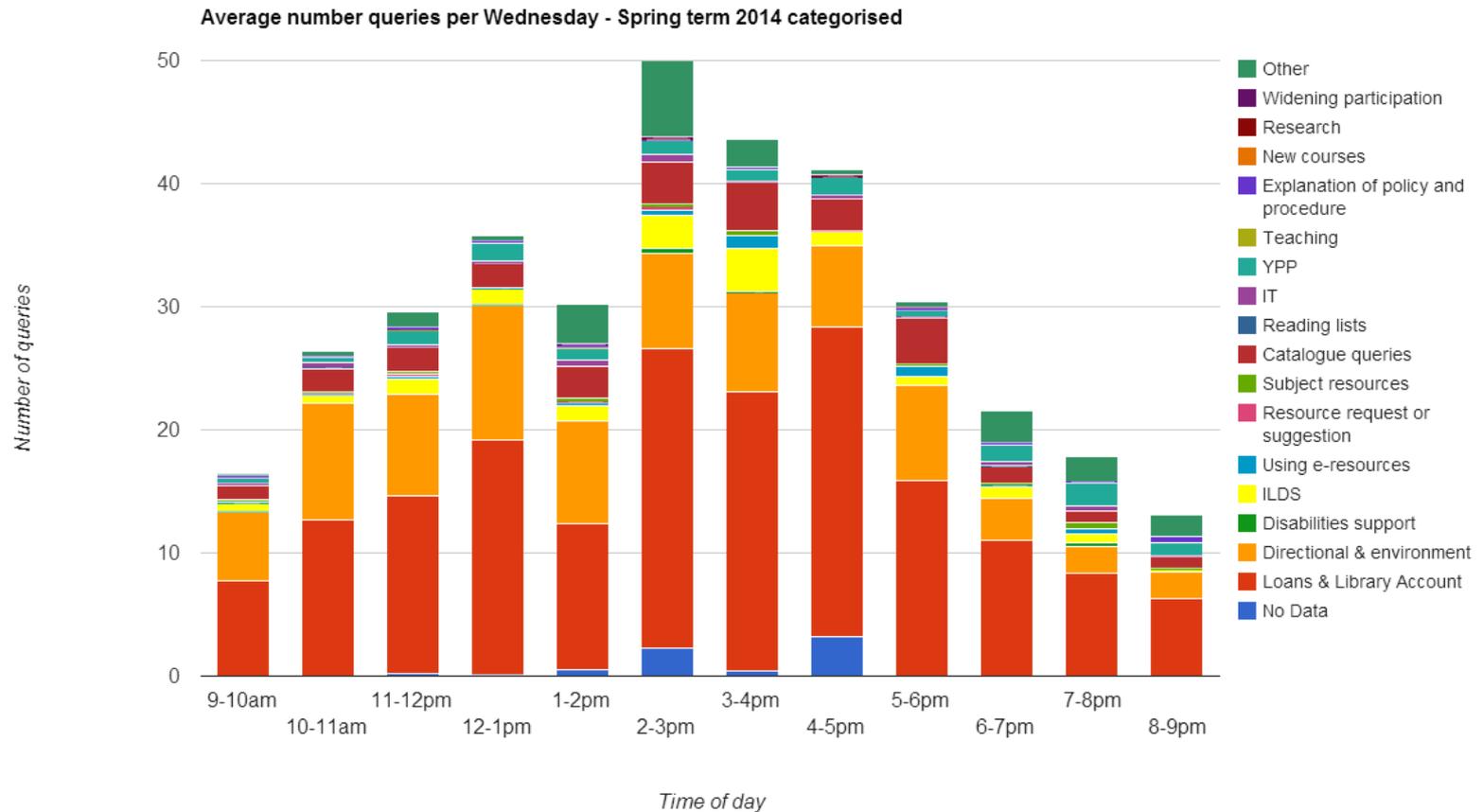
“The Information Directorate is a highly focused service delivered by staff who are professional, polite and helpful. It is ... forward thinking and proactive ... actively working to enhance services ...”

Information Directorate SMT Performance Report

Report Categories	Balanced or Value Scorecard Dimension	Measures	Benchmark / Comparator data	Narrative
1 Service	Satisfaction, Impact	22 teaching sessions in departments and WP attended by students - 2 sessions delivered for RDT (Research Support)		Spring term traditionally has less training sessions than Autumn. The review and audit of teaching in depts will review when teaching happens and if it is at the right time. The first dept we will be working with is Health Sciences.
		15 IT training sessions, 28 hours of teaching time (382 participants)	no comparative data	This includes traditional taught courses like Word and Excel but also 3 extremely successful Google Knowledge Sharing events which attracted large numbers. These have been based on different Apps (plus a general introduction session). We have scheduled more events for May and June. We are investigating ways to gather impact from these e.g. one participant told us they were going to go back to their team to discuss with the other 8 members how they might use some of the tools available.
		269 2nd line support queries (Library)	no comparative data	Most of these were directional queries (40%) with a quarter being about using e-resources. Due to the low level of enquiries an analysis of 2nd line support queries took place in March with a recommendation to trial a new Library Specialist Support Service for the Summer term. This is based in the Academic Liaison Office and is being reviewed and a recommendation about this will go to ISSM in August.
		3725 queries by department (Academic Liaison)	no comparative data	Please note that our shared subject email accounts now count interactions with departments (both emails received from departments and subsequently replied to by ALLs) which will mean a higher recorded figure than the previous period when we just recorded emails received from departments and not the ALL response.
		25 requests for YOAF funding of which 15 paid, 35 other Open Access queries Other Research Support queries recorded via Lib Answers (e.g. 7 copyright)	no comparative data	
		111 Footprint issues dealt with by Teaching and Learning	150 Footprints (Feb 2013 - Apr 2013)	Most of these are around Google and some have been very time intensive with people still using Outlook to sync their email and a number of Google Drive issues which were reported to Google and have since been resolved (Matthew Collins issue)
		112 Footprint issues dealt with by Comms	86 issues (Feb 2013 - Apr 2013)	

Customer service data

Report Categories	Balanced or Value Scorecard Dimension	Measures	Benchmark / Comparator data	Narrative																																																																																																								
Service	Satisfaction Impact	<p>Feedback scheme Folder available at: https://drive.google.com/a/york.ac.uk/#folders/0BxTLTFD3Z0sMWNiSWjWDBRRUE</p> <table border="1"> <thead> <tr> <th></th> <th>Feb 14</th> <th>Mar 14</th> <th>Apr 14</th> </tr> </thead> <tbody> <tr> <td>Library - TOTAL</td> <td>27</td> <td>30</td> <td>26</td> </tr> <tr> <td>Comment</td> <td>27</td> <td>30</td> <td>26</td> </tr> <tr> <td>Compliment</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>Complaint</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>IT - TOTAL</td> <td>37</td> <td>11</td> <td>11</td> </tr> <tr> <td>Comment</td> <td>21</td> <td>7</td> <td>5</td> </tr> <tr> <td>Compliment</td> <td>5</td> <td>3</td> <td>4</td> </tr> <tr> <td>Complaint</td> <td>13</td> <td>1</td> <td>2</td> </tr> <tr> <td>Archives - TOTAL</td> <td>23</td> <td>22</td> <td>14</td> </tr> <tr> <td>Comment</td> <td>2</td> <td>4</td> <td>3</td> </tr> <tr> <td>Compliment</td> <td>15</td> <td>18</td> <td>10</td> </tr> <tr> <td>Complaint</td> <td>6</td> <td>0</td> <td>1</td> </tr> </tbody> </table> <p>Library occupancy Headcount figures: https://docs.google.com/a/york.ac.uk/spreadsheet/ccc?key=0A1w4HqRsS-XsdHpRTU10bFpWSzkxRXIPY1NTVkrVa2c&usp=drive_web#gid=0</p>		Feb 14	Mar 14	Apr 14	Library - TOTAL	27	30	26	Comment	27	30	26	Compliment	0	0	0	Complaint	0	0	0	IT - TOTAL	37	11	11	Comment	21	7	5	Compliment	5	3	4	Complaint	13	1	2	Archives - TOTAL	23	22	14	Comment	2	4	3	Compliment	15	18	10	Complaint	6	0	1	<p>Feedback scheme Archive of feedback available in same folder as current data.</p> <table border="1"> <thead> <tr> <th></th> <th>Nov 13</th> <th>Dec 13</th> <th>Jan 14</th> </tr> </thead> <tbody> <tr> <td>Library - TOTAL</td> <td>25</td> <td>16</td> <td>28</td> </tr> <tr> <td>Comment</td> <td>25</td> <td>16</td> <td>28</td> </tr> <tr> <td>Compliment</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>Complaint</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>IT - TOTAL</td> <td>2</td> <td>1</td> <td>13</td> </tr> <tr> <td>Comment</td> <td>1</td> <td>0</td> <td>5</td> </tr> <tr> <td>Compliment</td> <td>1</td> <td>1</td> <td>6</td> </tr> <tr> <td>Complaint</td> <td>0</td> <td>0</td> <td>2</td> </tr> <tr> <td>Archives - TOTAL</td> <td>12</td> <td>18</td> <td>10</td> </tr> <tr> <td>Comment</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>Compliment</td> <td>12</td> <td>18</td> <td>10</td> </tr> <tr> <td>Complaint</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table> <p>Library occupancy Turnstile figures available for previous year only. Archive headcount data available on sheet provided.</p>		Nov 13	Dec 13	Jan 14	Library - TOTAL	25	16	28	Comment	25	16	28	Compliment	0	0	0	Complaint	0	0	0	IT - TOTAL	2	1	13	Comment	1	0	5	Compliment	1	1	6	Complaint	0	0	2	Archives - TOTAL	12	18	10	Comment	0	0	0	Compliment	12	18	10	Complaint	0	0	0	<p>Feedback scheme Monthly feedback reports are discussed at IT Managers and IS Group. Inconsistencies in reporting and processes still apparent.</p> <ul style="list-style-type: none"> Library label everything as a comment. Archives include replies received to emails sent. Library and IT don't as we handle higher query volume. <p>Feedback Review Project which will cover a review of the complaints process kicks off in mid June.</p> <p>Library occupancy % occupancy now being calculated and fed into seat availability app.</p>
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LIBRARY CAPITAL

Archives asset growth

Measure	Benchmark	Narrative
Pace and Sims detailed catalogue of 300 plans		Cataloguing adds value to existing asset and is the key to making archives available
Progress with Trevor Wishart physical and digital archive catalogue		Cataloguing adds value to existing asset and is the key to making archives available
Major additions and enhancements to Retreat Archive catalogue in association with Wellcome digitisation project		Cataloguing adds value to existing asset and is the key to making archives available
New archives received	15	
Initial cleaning of Helperby Hall Archive now complete		This archive, possibly worth 5 figures, is a gift to the University.

Human Capital data - capacity

Capacity (Jo to populate whole section, with the exception of Q5)

1) Standard staffing complement for the quarter (as at 30/4/2014):

	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Total
Full time (No./FTE)					5.0 fte	7.0 fte	1.0 fte	13 FTE
Part-time (No./FTE)					2 staff 1.4 FTE	3 staff 2.52 FTE		5 staff 3.92 FTE
Total (No./FTE)					7 staff 6.4 FTE	10 staff 9.52 FTE	1 staff 1.0 FTE	18 staff 16.92 FTE
Variance from previous quarter (+/-)					+0.84 fte	-0.08 fte	-	+1 staff +0.76 FTE
No. of staff above on Fixed Term contracts					2.0 FTE			
Number of leavers					1.0 FTE			
Number of vacancies (active/held)				1.0 FTE fixed term Junior Web Developer				

3) Absence

	Total	Variance from previous quarter (+/-)
Number of Annual leave days taken in the quarter	97 days	-21 days
Number of Bank Hols/Public Holiday days taken in the quarter	22 days	
A/L taken (incl BHs) during reporting period as a proportion of total leave allowance for the year in team (incl. c/f)	119/616.38 days 19.3% taken in Qtr	
A/L booked/taken as at 30/5/2014 as a proportion of total leave allowance for the year in team (incl. c/f)	485.24/616.38 days 78.8% booked/taken	+19.64% booked/taken
Number of Flex days taken in the quarter	12.5 days	+1 day
Number of <u>ToIL</u> days taken in the quarter	0	-1 day
Total number of leave days taken in the quarter (AL/BH/Flex)	131.5 days taken in the Qtr 7.8 days per fte	
Number of 'other leave' days taken – e.g. compassionate	3	-6 days
Number Sickness days in the quarter (working days)	27 days (9 days excluding 1 period of certified sickness)	+6.5 days (-11.5 days if exclude 1 instance of certified sickness)
Number of sickness days per <u>fte</u>	1.6 days per <u>fte</u> (0.53 days per <u>fte</u> excluding 1 instance of long-term sick)	+0.33 days per <u>fte</u>
Number of individuals who have taken sick leave in the quarter	<i>Individual data in <u>Appogee</u> not working</i>	
Number of informal/formal sickness meetings taken place (section leader to populate)	1	Informal for long-term sickness
Number of Occupational Health Referrals made (section leader to populate)	0	
Number of staff on long-term sick	0	

Capability (Jo to populate Q1/Section Leader to populate Q2/3)

1. Quantitative data on training and conference attendance:

	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Total
No. of external training/conference days attended					9	20.5	3	32.5 days
No. of internal University training days attended						10 (LiA & induction)		10 days

2. Quarterly narrative on sectional training completed, future training plans for the section and capability gaps

- FlossUK, Lean Management Conference at York, SDI, Grails training, ITIL
- AM and LH completed PRINCE 2 training

3. Quarterly narrative on whether we are gaining value from training completed (in strategy terms). What impact have new starters or any training or development completed had on the ability to deliver our services?

- Grails training is essential to ensuring our teams have the relevant skills for systems development and integration and ITIL sets the context for some of this.
- FlossUK is one of a number conferences that we have identified that we will attend each year to keep team to track emerging trends. Some knowledge gained here has already made it's way into the teams' practices.
- PRINCE2 knowledge is helpful in understanding the elements that contribute to successful project management. My recommendation would be that a Foundation course is sufficient and Practitioner adds little value.

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MOMENTUM

2	Innovation	Momentum (Projects)	163: Heslington Hall public exhibition	Court Exhibition held, May 2014
			167: Mellon 2	Awaiting response from Mellon
			Parish Registers and bishops transcripts	Awaiting report from Find My Past
			170: Retreat Archive Digitisation	Contract signed
			254: Scanning of plans and papers relating to War Memorials from the Atkinson Brierley Archive	Complete and exhibition currently running
			159: School registers digitisation	Awaiting report from Capita
			157. Shepherd Conservation project	25% of entire archive now cleaned (1,580 plans); 50% of the most brittle plans fully conserved.
			Registration and Notification Project	Renewal of University's institutional Data Protection registration and the notification of its uses of personal data; Visits to departments underway; Updates to institutional fair processing notices: student enrolment notice, HESA, DLHE

Content process narrative

3	Process	Process & process improvement	Collection Profiling: Investigating data in Alma Analytics to establish what is possible. Presentation by Ruth Elder to Relationship Management team 26.02.14.
			Testing of 3M Digital Library Assistant (DLA), in co-operation with Lending Services team. A DLA was made available to the library from Feb - May 14 to allow the exploration of its potential to add value to our work processes. The work flow to input/export from Alma to the DLA software to the DLA has been established. Users case studies have been identified and completed, including checking shelf order, pull list for withdrawal of stock, missing list and recording items used and left (not loaned) in the library. Contacts have been made (via Alma lists) with other libraries using 3M DLA's for comment and advice. Final report to be completed shortly.
			Key Texts Review is ongoing and should result in simplification of processes for ordering and requesting items for KT
			Alma Analytics reports being developed to streamline Fasttrack ordering
			Training staff in classification skills across a wider range of subjects to reduce time stock is kept on Content shelves
			New supplier tested for AV materials to reduce use of credit card and simplify ordering
			Work on preparing the data for the Subscriptions Review
			Serials and e-resources team have successfully streamlined their processes, following some brainstorming sessions and team meetings

A. Learning, Teaching and the Student Experience

Green

Overall Progress

The overall progress on this programme is strong, with a number of initiatives completed or in progress. In addition, initiatives in other areas of the strategy are also contributing to this programme.

Notable highlights

- Achievement of CSE standard for the Information Directorate.
- Lecture Capture system automation is now moved to the live environment
- Projects on reviewing our service desk tool, E-submission and E-Feedback and E-Assessment have begun.
- Key Texts review is underway, and looking to streamline processes for key texts.
- Preparation for supporting student induction for 2014/15 is underway, including key messages and updated videos on using IT/Library facilities for new students.

Expected milestones in the next quarter

- Lecture capture system project to complete by September
- IT classroom upgrades in DL/138 and HSL/LRC/0001
- Student induction delivered for Sept/Oct
- Integration of Office 365 with our Active Directory service, to allow students to access this.
- Benchmarking of archives services to contribute to their accreditation project.

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Projects

The table below shows all of the current or completed projects contributing to the University's Information Strategy.

Use the controls at the top of the page to filter the results and click on a column heading to sort them. Hover over the title of a project to view a description of it.

Please note: the table requires the latest version of Internet Explorer, Google Chrome or Firefox.

Programme
Title
Status

Choose... ▾

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ID	Programme	Title	Status	Start Date	Target Date	Description
106	Infrastructure Content and Knowledge Assets	Accessible external store	Complete	1/8/2013	1/12/2013	To provide an accessible external store for library content
154	Student Experience	Accreditation for archives services: Borthwick Institute	In Progress	1/10/2013	31/12/2015	External accreditation for the services provided in the Borthwick Institute for Archives.
34	Information Flow	Alma Implementation	In Progress	1/1/2012	31/08/2014	Installation and implementation of a new Library Management System, Alma.
253	Student Experience	Anonymous Assignment Submission	In Progress	1/5/2013	1/3/2014	Systems to support the anonymous submission of assignments by students
8	Information Flow	Application Jukebox	In Progress	1/12/2013	1/8/2014	Installation of Application Jukebox, allowing students and staff to download software available through our campus agreements, rather than having to use CDs/DVDs
155	Research Excellence	Archive management software selection	In Progress	1/6/2013	30/09/2014	Selection and implementation of software to manage the University's archives.
165	Information Flow	Archives catalogue digitisation and	In Progress		31/12/2015	Digitisation of our existing catalogue of archives.

Sudor

RELATIONAL CAPITAL

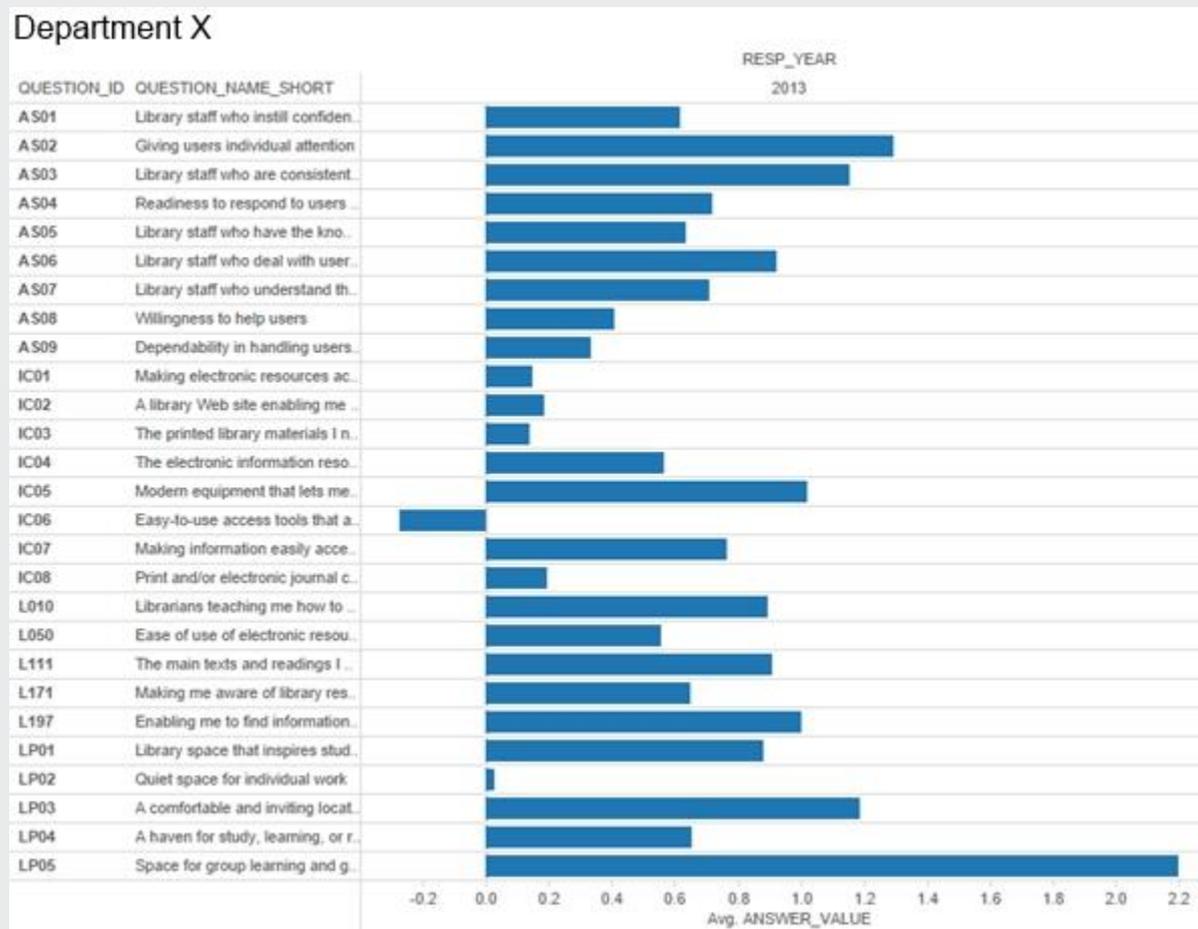
- RMT restructure aimed to give teams more focus - academic liaison team focus centred on building relationships with academic departments.
- RMT currently investigating ways of reporting activity with academic departments and measuring overall relationships with them.
- Trial of Insightly CRM system in Summer term 2014. Need to pursue a long-term CRM strategy but in the meantime developing an interim in-house solution based on Google architecture.
- Building up quantitative measures through various metrics e.g. monitoring email activity through the ALL subject accounts and recording data on number of meetings held with individual academic staff.
- Departmental Action Plans, based on LibQual and NSS feedback, provided qualitative narrative for understanding Directorate activity with departments and facilitated specific activities (*e.g. implementation of the Resource List Policy, audit of Health Sciences teaching, and 2015-16 focus on collection-related activities*).
- Monitoring the impact of our engagement activities on consecutive LibQual and NSS scores (*e.g. increase in History and English NSS scores directly attributed to targeted academic liaison activity in a number of areas*).

Measuring relational strength 1

Item	Rating
Does the ALL regularly attend Board of Studies?	Green
Is there a specific departmental library committee?	Red
Does the ALL regularly attend other departmental meetings (e.g. undergraduate committee)?	Green
Is the ALL on departmental staff mailing lists?	Yellow
Does the department keep the ALL up-to-date with general developments in the department?	Green
Is the ALL in regular contact with the Library Rep (in person, phone or email)?	Green
How is the relationship between the ALL and the Library Rep?	Green
Does the Library Rep regularly attend Library Committee?	Red
Does the department regularly ask for feedback on the library on module feedback?	Red
To what extent is information literacy training embedded in the UG programme?	Green
To what extent is information literacy training embedded in the PGT programme?	Green
Does the ALL deliver PGR training?	Green

Item	Rating
How well do the library book collections support UG teaching?	Green
How well do the library book collections support PGT teaching?	Yellow
How well do the library book collections support PGR and academic research activities?	Yellow
How effectively do the journal subscriptions support teaching and research needs in the department?	Green
How effectively do the electronic resource/database subscriptions match and support teaching and research needs in the department?	Green
Does the department spend up its resource allocation budget by the end of the financial year?	Green
Does the department spend up its resource allocation early on in the financial year?	Green
Is the use of EARL compulsory for all staff?	Green
Are Subject Guides widely used by staff and students in the department?	Yellow
How are the latest NSS scores?	Green
How are the latest LibQual results?	Green

Departmental action plans: Data



“[The Department] have for a long time had a fairly arm’s length engagement with the Library though I believe that a significant number of students and staff have been regular and frequent users of the Library both for physical and electronic resources.

Over the past few years engagement has increased with more active liaison between the Library and the department both via contact with the Library Representative and via attendance at BoS and Staff-student Consultative Committee.”

Measures	Benchmark
<p>Support work and advice for: ESRC and researcher bids/applications; Research projects and Data Management Plans IGGI Consortium (pan-institutional data sharing agreement drafted and implemented); European Project GreenEcoNet (SEI = UK partner) NERC DTC; WRoCAH; YUSU/GSA; HEFCE PSS PGT Project regarding data sharing; Centre for Health Economics (policy review); Data Processing Agreements and contract review: Library (Springshare); DARO (Crowdicity); Finance Office and Unit 4; Individual Electoral Registration: paper for Academic Registrar; Home Office consultation regarding repeal/amendment of section 24 of the Animals (Scientific Procedures) Act.</p>	
<p>Volunteer groups: 3 groups continuing to attend weekly, around 18 people. One professional conservator attending one morning weekly. One would-be archivist, with PhD in Music, attending 2 days a week to work on the Wishart Archive.</p>	<p>2 groups attending weekly, around 14 people. Atkinson Brierley project Nov. 2012 - Jan 2013 75 plans cleaned. Nov 2013 - Jan 2014 100 plans cleaned.</p>
<p>Blog posts 3</p>	<p>Blog posts 2</p>
<p>Twitter new followers: 74</p>	
<p>CCW has begun stint as external examiner for the MA in Archive and Record Management at UCD</p>	

- Gifts team - meeting with counterparts at Durham University Library to discuss process and good practice. As a result have committed to providing a regular report of gifts activity. Also to produce Deed of Gift transfer form validated at a higher level.
- Copac Collection Management Board Meeting: Leeds (05.03.14)
- National Acquisitions Group Seminar: Collection Development. Birmingham (21.05.14)
- Publication of article in Sconul Focus (Issue Number 60) Collection Profiling.
- Meeting with Hull University Library staff (invited by Relationship Management team) to discuss Collection Profiling 25.02.14. Meeting with external developer responsible for CRD CMS regarding Alma (04.03.14)
- Meeting with Bureau van Dijk and Research Innovation Office regarding FAME (05.03.14)
- NESLi2 review consultation (07.03.14) - met with the consultant undertaking this review on behalf of JISC Collections, in order to give feedback on our experience of the national deals for journal content

- Content staff met with the following publishers to discuss their products and service: Emerald, ProQuest, LexisNexis
- Content staff met with our 3 subscriptions agents (EBSCO, LM, Swets) to review their service
- The Alma Project team hosted a visit by Hull University library staff to discuss Alma (6.2.14); Hull are thinking of changing systems
- Lean Management Conference - a presentation of Flexible Loans process (19.3.14)
- Alumni / Donations meeting (29.4.14) Sarah attended the UKSG Annual Conference and Exhibition in April and delivered a presentation about our experience of implementing Alma
- Presented at a UKSG student roadshow at the Sheffield iSchool 12.3.14
- Attended two Dawsonera preview and focus group events designed to get feedback from key customers about prioritising developments to this ebook platform 5.2.14 and 30.4.14

Implementing the Value Scorecard

CONCLUSIONS

- Virtue
 - Work to do on impact
- Library Capital
 - Human good progress; other tangible not so good yet
- Relationships
 - Excellent progress; CRM in sight
- Momentum
 - Excellent progress & use in advocacy

Overall need to move to correlations

- Full year review (September 2014)
- Missing elements to fill in
- Tableau visualisation
- Dashboard production
- Predictivity of interventions

“There are intelligent [libraries] and stupid [libraries] ... intelligent groups gather information better and adapt better to reality... thus we find ‘social intelligence’

Luis Anglada (2007)

quoting Marina (2004)

- Ian Hall, Ruth Elder, Sarah Thompson, Michelle Blake, Karen Smith, and all data contributing teams at UoY
- The York Manuscripts Conference 2014
- Wollongong University
- Matt Stripe, Nestle (UK & Ireland)

Questions?