Are We There Yet?
Aligning Planning and Metrics, Strategically

Raynna Bowlby
raynna.bowlby@charter.net
Strategic Planning is a Cyclical Process
Strategic Planning is a Cyclical Process

http://strategicplan.illinois.edu/planning_process.html
Is there any evidence that libraries “close the loop” connecting assessment data back into the planning cycle to influence future action?

An ARL mini-environmental scan & meta-analysis with a disclaimer…
We know that ARL libraries are working on assessment.
Assessment in ARL Libraries

- In May 2007, 73 ARL libraries completed the survey for a response rate of 60%. **Only one library indicated that it did not engage in any assessment activities** beyond collecting annual data for the ARL statistics…

- “The ‘typical’ library assessment programs began in the 1990s and engage in various assessment activities in addition to the collection of ARL statistics…The programs most frequently **gather statistics** (100%), but are also strongly involved in doing various **user surveys**, **Web usability testing**, and **focus groups**. They have performed studies of their Web sites. They track usage statistics for electronic resources and assess user education programs, collections, and reference.”

Raynna Bowlby
We know that ARL libraries are preparing Strategic Plans

The University of Arizona Libraries and Center for Creative Photography
Strategic Plan FY2009-2013

Mission: The University of Arizona Libraries and Center for Creative Photography are a vital and exciting entity to a world of discovery and creativity for individuals and communities of scholars. We provide unlimited access to information in a customer-centered environment where traditional and emerging information services converge.

Vision: The University of Arizona Libraries and Center for Creative Photography are a vital and exciting entity to a world of discovery and creativity for individuals and communities of scholars. We provide unlimited access to information in a customer-centered environment where traditional and emerging information services converge.

University of Hawaii at Manoa Library Strategic Plan 2008-2015

Vision
Mālama i ka 'ike
“Caring for Knowledge”

Mission
The University of Hawai‘i at Mānoa Library acquires, organizes, preserves, and provides access to information resources vital to the learning, teaching, and research mission of the University.

Setting Directions
Building on the strategic directions identified in the 2003 operational plan Honoring the Past, Challenging the Present, Creating the Future: Strategic Directions for Western Libraries, our new strategic plan for 2007-08 to 2010-11 aligns our priorities more closely with the overall University strategic directions in key areas identified in Western’s strategic plan Engaging the Future (2005):
- Enhancing the student experience
- Expanding and enriching the experience of graduate students
- Building the research-intensive university

The planning process for the University is a collaborative one that identifies priorities and links budget decisions to those priorities and that also evaluates progress toward outcomes identified by individual units and the University as a whole. Our annual budget submissions relate directly to the strategic directions set by Western Libraries. The University-level response to our budget submissions will involve the allocation of resources that allow joint progress towards the strategic directions and successful achievement of outcomes defined in the strategic plans for Western Libraries and the University.

Our strategic directions will require a careful balance between the library-as-place (the physical library represented by our seven physical locations) and the place-as-library (the digital library providing access anywhere/anytime) as welcoming places that engage our faculty, staff, and students in three broad areas:
- Research and Scholarship
- Teaching and Learning
- Support to the University Community, Key Partners, Alumni, and the Community-at-large.

The University’s general themes of Interdisciplinarity, Pan-University initiatives, and internationalization will shape the design and implementation of initiatives in these broad areas.

Mission
Western Libraries is committed to excellence: articulating information and service needs related to the University’s goals for research and scholarship, teaching and learning, and service to our university community and key partners. Our staff engages the Western academic community in the development of new services, and continuously strives to exceed the expectations of our diverse user groups.

Vision
Western Libraries will be a leader in providing both the best library-as-place and the best place-as-library experience for the Western academic community.
Strategic Plans in ARL Libraries

An ARL mini-environmental scan & meta-analysis, with a disclaimer...

9 ARL members do not appear to have publicly accessible plans on the web
11 ARL members are non-Universities
Strategic Plans in ARL Libraries
An ARL mini-environmental scan & meta-analysis, with a disclaimer...

72 ARL members: Full Strategic Plans
Mission, Vision, Values, and Goals

28 ARL members:
Mission, Vision, Values, and occasionally Strategic Directions

Is there any evidence that libraries “close the loop” connecting assessment data back into the planning cycle to influence future action?

+ info from 4 ARL Scorecard Participants
VENN DIAGRAM!

19 Strategic Plans with Metrics

Plus info from 4 ARL Scorecard Participants
The American Library Association (ALA) has named *Viewing Library Metrics from Different Perspectives: Inputs, Outputs, and Outcomes* the winner of the 2010 Greenwood Publishing Group Award for the Best Book in Library Literature.

The book was written by Robert E. Dugan, Peter Hernon and Danuta A. Nitecki and published by Libraries Unlimited.

“Metrics … play a critical role in showing how libraries advance the mission of the institution…Metrics, in sum, play a role in strategic and other types of planning.”
“There is no general consensus regarding the preference for the word *measure* or *metric*…

Metrics…might identify *targets* and the extent to which they have been achieved”.

Library Assessment Conference 2010
# Strategic Plan Describes Intention

**What and sometimes How to Measure**

<table>
<thead>
<tr>
<th>Library</th>
<th>Strategic Plan</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auburn University Libraries</td>
<td>Strategic Plan 2007-2012</td>
<td>• “Conduct formal user studies to evaluate effectiveness of service”&lt;br&gt;• “Assess impact of library instruction activities on student learning”&lt;br&gt;• “Benchmark technology with similar institutions”&lt;br&gt;• “Measure employee satisfaction and morale via climate surveys”</td>
</tr>
<tr>
<td>Howard University Libraries</td>
<td>Strategic Plan 2005</td>
<td>• “Pre- and post-tests to measure participants’ learning”&lt;br&gt;• “Bibliography prepared by ... Expository Writing students”&lt;br&gt;• “Analysis of selected theses and faculty publications”&lt;br&gt;• “Survey to assess satisfaction levels of different categories of users”</td>
</tr>
<tr>
<td>Penn State University Libraries</td>
<td>Strategic Plan 2008-2013</td>
<td>• “Track and analyze usage of library services and resources, such as traffic counts, and user contacts in person and through online services”&lt;br&gt;• “Review and analyze collections expenditures by disciplinary area and by format”&lt;br&gt;• “Implement an internal (department-to-department) customer service satisfaction survey and analyze results for potential improvements”</td>
</tr>
<tr>
<td>University of Western Ontario Libraries</td>
<td>Strategic Plan 2007-08 – 2010-11 (Rev. 2008)</td>
<td>• “...performance indicators currently available to the academic library community ...will be used...a wide range of ARL quantitative indicators; ARL LibQUAL+ survey data providing qualitative data; Ontario Council of University Libraries (OCUL) Scholars Portal survey data in both quantitative and qualitative information; and library questions on the Western Survey of Graduating Students”&lt;br&gt;• “...selective needs assessments targeted to specific groups using a variety of techniques: focus groups, usability studies, web surveys or one-on-one consultation”</td>
</tr>
</tbody>
</table>
## Strategic Plan Describes Intention

### Units of Measure and sometimes How to Measure

| University of Colorado at Boulder Libraries | Strategic Plan 2006 (Measures added later) | Measures | “Instructional Contacts”  
|                                           |                                          |          | “Information Resources per FTE Student”  
|                                           |                                          |          | “Size of Digital Collections” Megabytes  
|                                           |                                          |          | “LibQUAL+ Overall Perceived vs. Minimum Gap Score” Overall Adequacy Mean Score  
| University of Illinois at Chicago Library | Strategic Plan 2006 | Performance Metrics | “Number of campus units that participate in the University Archives’ Records Management Program”  
|                                           |                                          |          | “Number of researchers and scholars contributing to the Institutional Repository and open access journals”  
|                                           |                                          |          | “Improved student and faculty satisfaction with the physical environment of Library spaces”  
| University of Notre Dame Libraries        | Strategic Plan 2004 | Assessment/Target | “# collections converted [to digital content]”  
|                                           |                                          |          | “National Survey (SAILS) [to measure library instruction learning objectives]”  
| Texas Tech University Libraries           | Strategic Plan | Critical Success Factors & Assessments | “Number of requests for Americans with Disabilities Act services”  
|                                           |                                          |          | “Number of students who complete instruction sessions”  
|                                           |                                          |          | “Number of reference questions answered electronically”  
|                                           |                                          |          | “Amount saved by cooperative purchasing”  


### Strategic Plan Describes Intention

**Units of Measure and sometimes Desired Result**

| University of Kentucky Libraries | Strategic Plan 2010-2014 | Metrics | “Increase the number of unique collections that are digitized and accessible”  
|                                |                         |         | “Improve the ranking among public research universities...according to the Library Investment Index of the Association of Research Libraries”  
|                                |                         |         | “Increase the number of materials loaned to [state’s] libraries by 5%”  |
| Purdue University Libraries    | Strategic Plan 2006-2011 | Metrics and Benchmark Measures | “Longitudinal scores from Information and Communication Technology (ICT) Literacy Assessment Test”  
|                                |                         |         | “Number of Libraries faculty participating in collaborative or sponsored research”  
|                                |                         |         | “Door count: number of visits”  
|                                |                         |         | “Reduced number of Libraries’ facilities”  |
| York University Libraries      | Strategic Plan 2007-2011 (Targets added later) | Expected Results/Measurables | “Decrease the average time to supply materials needed for research”  
|                                |                         |         | “Begin tracking costs and use (items downloaded/viewed)”  
|                                |                         |         | “Student survey feedback indicates greater success in finding information through the Libraries’ web”  
|                                |                         |         | “Marked improvement in the ratio of students per study space in the libraries”  |
# Strategic Plan Describes Intention

*Units of Measure and Desired Results, occasionally Targets*

<table>
<thead>
<tr>
<th>Library</th>
<th>Strategic Plan Description</th>
<th>Targets</th>
</tr>
</thead>
</table>
| University of Hawaii at Manoa Library | Strategic Plan 2008-2015 (Targets added later)                    | · “Expand expert care for collections” “as measured by increasing the number of items processed per year by 10%”  
   |                                                                  | · “Approaching the desired mean [of]LibQUAL affect of service measures AS-1, AS-4, AS-5, AS-7, and AS-9 by the 2009 LibQUAL” |
| McGill University Libraries   | Strategic Plan 2009-2010                                         | · “Reduction of cataloguing backlog by 50,000 items by May 2010; all cataloguing records, including those for e-sets loaded both locally and on OCLC within 1 month of receipt”  
   |                                                                  | · “Two thirds of all branch libraries refurbished with new seating and facilities by May 2010” |
| The Ohio State University Libraries | Strategic Plan 2010-2012 (Draft)                                 | · “Increase percentage spent on e-books from 10% to 15%, fy2011”  
   |                                                                 | · “5 library faculty complete [e-learning] program” by WI 2012  
   |                                                                 | · “80% of participants develop online learning objects” by AU 2012 |
| University of Tennessee Libraries | Strategic Plan FY2008-09 to FY2010-11                            | · “Number of items in e-book collections” (10% increase in number of e-books over 3 years)  
   |                                                                 | · “Number of streaming media items available and year-over-year change” (5% change over 3 years)  
   |                                                                 | · “Increased [Development prospects] face-to-face visits and solicitations” |
Strategic Plan Specifies Intention

Metrics with Targets

- University of Arizona Libraries and Center for Creative Photography
  - Strategic Plan FY 2009-2013
  - Performance Measures and Quality Standards

- University of Calgary
  - 2009-2014 Business Plan
  - Performance Measures and Performance Targets

- University of Connecticut Libraries
  - Plan 2014
  - Metrics and (Baseline) vs. Goal 2014

- University of Illinois at Urbana-Champaign University Library
  - Strategic Plan 2006 (Metrics added 2009)
  - Metric (FY09) and Target 2011 and Target 2013
Strategic Plan Specifies Intention
Measuring Service
Metrics with Targets

- **Arizona**
  - Information Resources & Services
  - Information Resources Management
  - Education Performance
  - Digital Library Performance

- **Connecticut**
  - Undergraduate Education
  - Graduate & Professional Education
  - Research, Scholarship & Creative Activity
  - Diversity
  - Public Engagement
  - Library Administrative Organization

- **Calgary**
  - Learning Environment
  - Student Success
  - Research & Scholarship
  - Facilities
  - Community Service
  - Staff

- **UIUC**
  - Services
  - Collections
  - Research Activity
  - Facilities
  - Professionals
  - Overall College Metrics
### Strategic Plan Specifies Intention

**Measuring Service**

Metrics with Targets: University of Illinois at Urbana - Champaign

<table>
<thead>
<tr>
<th>METRICS</th>
<th>DESIRED RESULT</th>
<th>BASELINE (FY09)</th>
<th>TARGET (2011, 2013)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference transactions</td>
<td>Decrease</td>
<td>127,996</td>
<td>105,000 100,000</td>
</tr>
<tr>
<td>Participants in instructional programs</td>
<td>Decrease</td>
<td>27,479</td>
<td>25,000 23,000</td>
</tr>
<tr>
<td>Electronic reserves downloads</td>
<td>Increase</td>
<td>642,843</td>
<td>655,000 667,000</td>
</tr>
<tr>
<td>Visits to Library Web site</td>
<td>Increase</td>
<td>118M+</td>
<td>130M 150M</td>
</tr>
<tr>
<td>Illinois digital collection downloads</td>
<td>Increase</td>
<td>917,900</td>
<td>1.15M 1.4M</td>
</tr>
<tr>
<td>IDEALS (repository) collection downloads</td>
<td>Increase</td>
<td>597,464</td>
<td>896,000 1.15M</td>
</tr>
</tbody>
</table>
Strategic Plan Specifies Intention
Measuring Service
Metrics with Targets: University of Arizona

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>LibQUAL+® Information Control</td>
<td>Reduce Superiority Gap for All respondents</td>
<td>From -1.09</td>
<td>To -0.87</td>
</tr>
<tr>
<td>LibQUAL+® Affect of Service</td>
<td>Reduce Superiority Gap for All respondents</td>
<td>From -0.87</td>
<td>To -0.70</td>
</tr>
<tr>
<td>LibQUAL+® Item “Personalization features in the electronic library”</td>
<td>Reduce Superiority Gap for All respondents</td>
<td>From -0.81</td>
<td>To -0.65</td>
</tr>
<tr>
<td>Percentage of holdings open to web browsers</td>
<td>Holdings added from 2000 forward of Libraries CCP are in OCLC or otherwise open to most web browsers</td>
<td>100% (6/30)</td>
<td></td>
</tr>
</tbody>
</table>
“...as we look at our context—especially the economic environment, our competition, and demands for accountability—it is evident that we cannot live in isolation from the outside pressures our institutions face. We cannot evaluate quality as if a library was an end in itself. We must address and measure the value of the library by the standards and outcomes that are important to our customers and campus stakeholders.”

Strategic Plan Specifies Intention
Measuring Teaching & Learning
Metrics with Targets

- Arizona
  - Information Resources & Services
  - Information Resources Management
  - Education Performance
  - Digital Library Performance

- Connecticut
  - Undergraduate Education
  - Graduate & Professional Education
  - Research, Scholarship & Creative Activity
  - Diversity
  - Public Engagement
  - Library Administrative Organization

- Calgary
  - Learning Environment
  - Student Success
  - Research & Scholarship
  - Facilities
  - Community Service
  - Staff

- UIUC
  - Services
  - Collections
  - Research Activity
  - Facilities
  - Professionals
  - Overall College Metrics
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<tr>
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<tbody>
<tr>
<td>Ratio of amount of time required, per student served</td>
<td>Decrease in ratio of average time required per student served to develop &amp; deliver education/ instruction sessions or tutorial/tools/modules</td>
<td>TBD</td>
<td>25% (BY 6/30/12)</td>
</tr>
<tr>
<td>Number of student credit hours</td>
<td>Increase number of student credit hours generated through courses created by the Library</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>Use of credit and noncredit modules</td>
<td>Increase in the number and in the use of credit and noncredit modules by faculty, students and use in D2L</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>LibQUAL+® Item “Teaching me how to access, evaluate, and use information”</td>
<td>Reduce Superiority Gap for All respondents</td>
<td>TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>LibQUAL+® Item “Online course support (readings, links, references)”</td>
<td>Reduce Superiority Gap for All respondents</td>
<td>TBD</td>
<td>TBD</td>
</tr>
</tbody>
</table>
### Strategic Plan Specifies Intention

**Measuring Teaching & Learning**

Metrics with Targets: University of Connecticut

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Group study rooms/spaces</td>
<td>Increase number of technology-enhanced group study rooms/spaces for small group collaboration, student meetings, and tutoring</td>
<td>From 4</td>
<td>To 10</td>
</tr>
<tr>
<td>Libraries-sponsored events aimed at undergraduates</td>
<td></td>
<td>1 per year</td>
<td>3 per year</td>
</tr>
<tr>
<td>Assessment of information literacy</td>
<td>Library-wide undergraduate-focused qualitative assessments of information literacy</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Faculty initiatives (forums, colloquia, etc.) on infusing information literacy into the curriculum and assessing student skill development</td>
<td>1 per year</td>
<td>3 per year</td>
<td></td>
</tr>
<tr>
<td>LibQUAL+® Information Control</td>
<td>Increase Perceived level of service quality for Undergraduates</td>
<td>From 7.41</td>
<td>To 8.00</td>
</tr>
<tr>
<td>“Modern equipment that lets me easily access needed information”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LibQUAL+® Information Control</td>
<td>Increase Perceived level of service quality for Undergraduates</td>
<td>From 7.07</td>
<td>To 7.77</td>
</tr>
<tr>
<td>“A library Web site enabling me to locate information on my own”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LibQUAL+® Library as Place</td>
<td>Increase Perceived level of service quality for Undergraduates</td>
<td>From 7.07</td>
<td>To 7.77</td>
</tr>
<tr>
<td>“Quiet space for individual activities”</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Strategic Plan Specifies Intention
Measuring Learning Environment
Metrics with Targets

- **Arizona**
  - Information Resources & Services
  - Information Resources Management
  - Education Performance
  - Digital Library Performance

- **Connecticut**
  - Undergraduate Education
  - Graduate & Professional Education
  - Research, Scholarship & Creative Activity
  - Diversity
  - Public Engagement
  - Library Administrative Organization

- **Calgary**
  - Learning Environment
  - Student Success
  - Research & Scholarship
  - Facilities
  - Community Service
  - Staff

- **UIUC**
  - Services
  - Collections
  - Research Activity
  - Facilities
  - Professionals
  - Overall College Metrics
**Strategic Plan Specifies Intention**

**Measuring Learning Environment**

**Metrics with Targets: University of Calgary**

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>LibQUAL+® Library as Place “Library space that inspires study and teaching”</td>
<td>Change in Adequacy Gap for All respondents</td>
<td>From -0.12</td>
<td>To -0.03</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>To +0.50</td>
</tr>
<tr>
<td>LibQUAL+® Library as Place “Library space that inspires study and teaching”</td>
<td>Change in Adequacy Gap for Undergraduates</td>
<td>From -0.07</td>
<td>To +0.02</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>To +0.50</td>
</tr>
<tr>
<td>LibQUAL+® Library as Place “Quiet space for individual activities”</td>
<td>Change in Adequacy Gap for All respondents</td>
<td>From +0.21</td>
<td>To +0.24</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>To +0.50</td>
</tr>
<tr>
<td>LibQUAL+® Library as Place “Quiet space for individual activities”</td>
<td>Change in Adequacy Gap for Undergraduates</td>
<td>From -0.01</td>
<td>To +0.01</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>To +0.50</td>
</tr>
</tbody>
</table>

**Metrics with Targets: UIUC**

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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Gate count</td>
<td>Increase</td>
<td>3,051,681</td>
<td>3,065,000 3,081,000</td>
</tr>
<tr>
<td>Square footage renovated</td>
<td></td>
<td>368,202</td>
<td>TBD</td>
</tr>
</tbody>
</table>
“Metrics are tools for both planning and for analytical review. For planning, they allow us to design and articulate elements essential in realizing principle missions. For review, while it is always useful to confirm success, it is even more useful to have tools that alert us to possible shortcomings in our conceptual and operational approaches.”

Tom Hickerson, Vice-Provost (Libraries and Cultural Resources) and University Librarian, University of Calgary
Strategic Plan Specifies Intention
Measuring Research & Scholarship
Metrics with Targets

- **Arizona**
  - Information Resources & Services
  - Information Resources Management
  - Education Performance
  - Digital Library Performance

- **Connecticut**
  - Undergraduate Education
  - Graduate & Professional Education
  - Research, Scholarship & Creative Activity
  - Diversity
  - Public Engagement
  - Library Administrative Organization

- **Calgary**
  - Learning Environment
  - Student Success
  - Research & Scholarship
  - Facilities
  - Community Service
  - Staff

- **UIUC**
  - Services
  - Collections
  - Research Activity
  - Facilities
  - Professionals
  - Overall College Metrics
## Strategic Plan Specifies Intention

**Measuring Research & Scholarship**

Metrics with Targets: University of Connecticut

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>Number of items in <a href="mailto:DigitalCommons@UConn.edu">DigitalCommons@UConn.edu</a></td>
<td>Increase</td>
<td>4,800</td>
<td>7,200</td>
</tr>
<tr>
<td>Number of e-journals accessible to users</td>
<td>Increase by 4%</td>
<td>17,300</td>
<td>18,000</td>
</tr>
<tr>
<td>Number of objects digitized</td>
<td>Increase by 5% per year</td>
<td>65,800</td>
<td>69,100</td>
</tr>
<tr>
<td>Usage statistics for digitized objects</td>
<td>Increase by 10% per year</td>
<td>573,167</td>
<td>630,480</td>
</tr>
<tr>
<td>Percentage of budget spent on digital format resources</td>
<td>Increase</td>
<td>80%</td>
<td>90%</td>
</tr>
<tr>
<td>Student and faculty use of the liaison program</td>
<td></td>
<td>50%</td>
<td>70%</td>
</tr>
<tr>
<td>Number of research consultations by academic liaisons and curators</td>
<td>Increase number annually</td>
<td>1,000</td>
<td>2,000</td>
</tr>
<tr>
<td>LibQUAL+® Information Control “Print and/or electronic journal collections I require for my work”</td>
<td>Increase Perceived level of service quality for All respondents</td>
<td>From 7.21</td>
<td>To 7.50</td>
</tr>
<tr>
<td>LibQUAL+® Information Control “The electronic information resources I need”</td>
<td>Increase Perceived level of service quality for All respondents</td>
<td>From 7.21</td>
<td>To 7.50</td>
</tr>
</tbody>
</table>
“University governing boards are often comprised of trustees from the for-profit sector who demand accountability; they want to see quantitative measures from university administrators that demonstrate the value of the University’s investments in its various components.

Along with the rest of the enterprise, Libraries are increasingly called upon to demonstrate in quantitative terms the contributions their activities make to their University’s success.”

Quote from Brinley Franklin, Vice Provost for University Libraries, University of Connecticut
ARL Library Scorecard Initiative

“Engage a small number of research libraries in a systematic way to consider the benefits of developing and applying a locally developed library scorecard”

ARL and Ascendant Strategy Management Group
- Johns Hopkins University Library
- McMaster University Library
- University of Virginia Library
- University of Washington Library

If you missed the session held earlier today, be sure to check the LAC Conference Proceedings for:
- Building Scorecards in Academic Research Libraries: Organizational Issues and Measuring Performance
- Vivian Lewis, McMaster University; Steve Hiller, University of Washington Elizabeth Mengel, Johns Hopkins University; Donna Tolson, University of Virginia
Using BSC to Integrate Assessment and Planning in Libraries

“Primarily for historical reasons, the vast majority of libraries collect a plethora of internally focused performance measures and statistical information. Some of these measures are reported to the library’s stakeholders, some are used to complete annual surveys required by various organizations, and sadly, many are gathered but then ignored.

The goal of this workbook is to assist the library in determining what performance measures and metrics are important within a broader context of strategic planning and management. These important measures should focus on what defines the success of the library and shows the difference it makes in the lives of customers.

The balance scorecard is not another “go out and measure everything” exercise. Keeping score by itself does not reveal anything about how to win the game. The scorecard helps keep track of the progress a library is making in achieving its goals.

Strategic Planning is a Cyclical Process

Is there any evidence that libraries “close the loop” connecting assessment data back into the planning cycle to influence future action?
Are We There Yet?
Aligning Planning and Metrics, Strategically

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