Serving Multiple Stakeholders

Crafting a *blended* scorecard at the
University of Minnesota Health Sciences Libraries
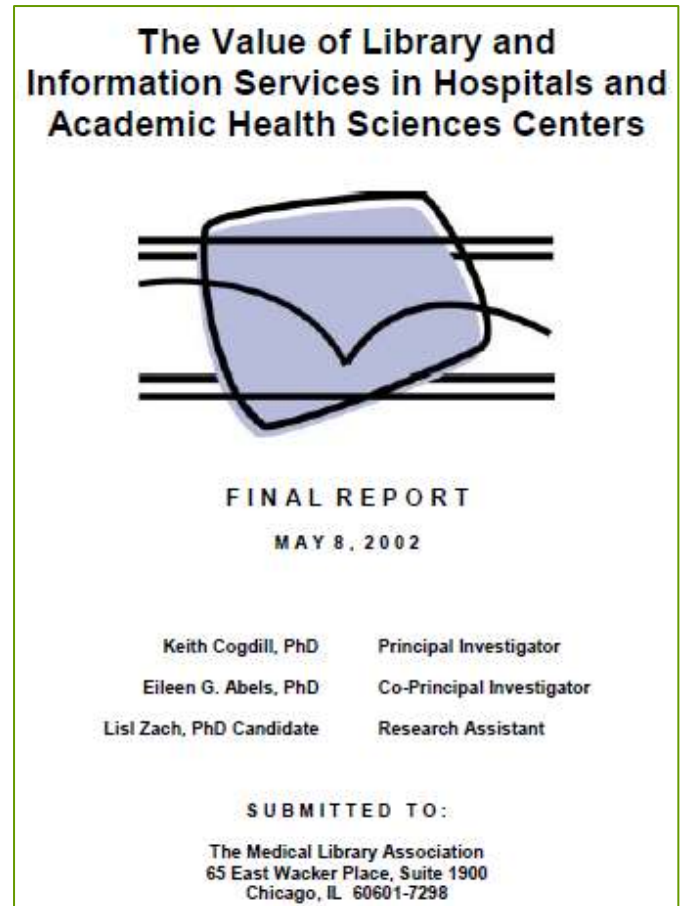
UNIVERSITY OF MINNESOTA

Balanced Scorecard (BSC)

- Historically, assessment focused on *financial* bottom line
- BSC first introduced in the business world to assess four perspectives of an organization:
  - User/Customer
  - Financial
  - Internal Process
  - Learning and the Future
- Four perspectives help identify a small set of carefully selected and "balanced" measures that reflect the organization's mission
- Evaluation based on these measures provides a quick, comprehensive picture of organizational performance over time

BSC in Practice

- Used widely by for-profit and not-for profit organizations

- Success in large academic libraries and public libraries

- Not yet tested in Academic Health Sciences Libraries
  - Does not account for complex reporting structures
  - Does not speak the language of libraries or stakeholders

BSC in Health Sciences Libraries

- Health Sciences Libraries have long struggled identifying measures to prove value – including the HSL

- HSL collects 222 data points, but which ones are important?
  - 129 (58%) used for internal management decisions
  - 56 (25%) collected manually
  - 49 (22%) collected monthly

- High investment for small return

The Value of Library and Information Services in Hospitals and Academic Health Sciences Centers

FINAL REPORT

MAY 8, 2002

Keith Cogdill, PhD — Principal Investigator

Eileen G. Abels, PhD — Co-Principal Investigator

Lisl Zach, PhD Candidate — Research Assistant

SUBMITTED TO:

The Medical Library Association
65 East Wacker Place, Suite 1900
Chicago, IL 60601-7298

UNIVERSITY OF MINNESOTA

BSC @ HSL

- Several events led to HSL Metrics that Matter goal and project team:
  - LibQual Participation (2003)
  - MN Office of Higher Education developed state goals and indicators for performance accountability (2005)
  - Board of Regents approved strategic plan with a charge to identify metrics and measures to monitor progress towards goals (2005)
  - Library funding changed from a "common good" to a "cost allocation pool" budget model (2006/2007)

BSC @ HSL

- HSL Metrics that Matter team formed (2006)
  - Charge: Identify and measure activities that express outcomes and impacts that are meaningful to funders and constituents
- Final report and recommendations completed (2007)
  - Use modified BSC to structure HSL evaluation
  - The modified BSC should reflect the mission of the library's parent organization

UNIVERSITY OF MINNESOTA

LIBRARIES

Health Sciences Libraries

Metrics That Matter
Final Report

Submitted on behalf of the HSL Metrics That Matter Team by:

Katherine Chew, Head, Collection Management, Health Sciences Libraries

With some contributions by:

Steve Llewellyn, Head of Access Services, Health Sciences Libraries

HSL Metrics That Matter Team co-chairs

June 2007

*blended*BSC @ HSL

- HSL's Management Team modified the BSC perspectives, creating a *blended*BSC

- The *blended*BSC reflected the original BSC perspectives and Academic Health Center mission that focuses on *education*, *research* and *outreach* in the health sciences

AHC Mission

Educate the next generation of nurses, pharmacists, public health professionals, and veterinarians

Discover and deliver new preventions treatments, and cures that improve the health of families and communities

Enhance Minnesota's bioscience industries and grow the state's economy

UNIVERSITY OF MINNESOTA

*blended*BSC @ HSL

*blended*BSC Perspectives

1. Education & Learning
   - How well is the library contributing to user success in teaching and learning in order to prepare the next generation of health professionals?

2. Research & Clinical Care
   - How well is the library providing expertise, resources and delivery systems to help researchers and clinicians discover and translate new knowledge and sustain the vitality and excellence of Minnesota's health care?

3. Service & Outreach
   - How well is the library providing outreach and developing partnerships to improve the health of Minnesotans and build a culture of service and accountability?

4. Internal Businesses Processes & Learning and Growth
   - How does the library's internal processes and organizational capacity function to efficiently deliver library resources and services?

UNIVERSITY OF MINNESOTA

Findings

- *blended*BSC perspectives resonate with stakeholders
- *blended*BSC framework too complex
- Selecting the "right" data points is difficult and takes time

Example Perspective

Internal Business Processes & Learning and Growth Perspective
How does the library's internal processes and organizational capacity function to efficiently deliver library resources and services?

Objectives	Linkages	Activities	Measures	Targets	Outcomes
Maximize External Library Funding	HSL 4 UL 7 AHC 2	**I (4a):** Develop and implement an external funding plan: a.Develop plans/ideas for fund-raising b.Obtain or participate as collaborators in grants c. Maximize use of current endowments	Percentage of external funding as portion of total HSL budget	**T1:** External funding represents 3% of HSL budget **T2:** External funding represents 1% of annual budget	Target 1

UNIVERSITY OF MINNESOTA

Current Progress

The HSL successfully…

- ☑ Created the *blendedBSC* framework
- ☑ Drafted HSL goals (2009-2010)
- ☑ Incorporated goals framework

The HSL did not…

- ☒ Identify relevant measures and targets
- ☒ Collect data for each of the measures

UNIVERSITY OF MINNESOTA

Next Steps

- Continue working to develop a *blended* BSC framework that is both *useful* and *usable*

- Recommendation to break the *blended* BSC from the HSL's annual goals
  - Allows for the selection of a small set of high-level measures and targets
  - Creates a more static document as measures do not change from year to year with changing goals
  - Provides continuity of measures over time to capture baseline and comparison data

Expected Outcomes

- Implementation of a simplified *balanced*BSC will measure the extent to which organizational goals have been met

- Results will be used internally to set future goals, and externally to communicate successes and areas for improvement

- When used annually, comparison statistics will be collected to see success over time

Questions?

Thank you.

Katherine Chew, MLS
Assistant Librarian and Associate Director for Research, Collections and Access Services

Erinn Aspinall, MSI
Special Projects Librarian