



Strategic Plan Woes: Using the Balanced Scorecard to Move Forward

Ellen N. Sayed, MLS, M.Acc.

Director, MCW Libraries, Medical College of Wisconsin, Milwaukee, WI, USA.
esayed@mcw.edu

Colleen Cuddy, M.A., MLS

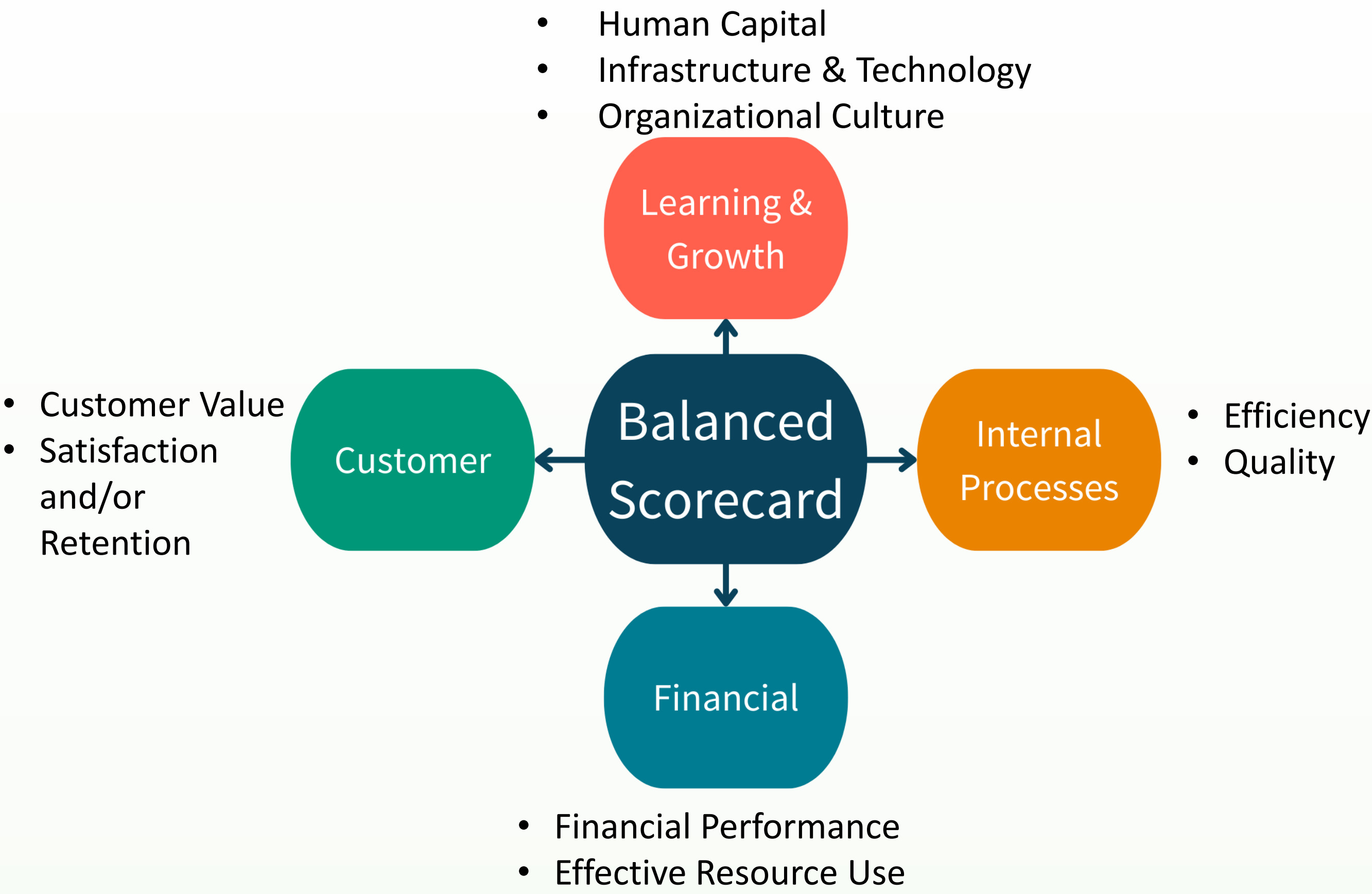
Director of Research and Academic Collaboration, Stanford School of Medicine, Stanford University, Stanford, CA, USA.
ccuddy@stanford.edu

INTRODUCTION

Strategic planning is intended to set clear goals for the organization: long term goals that are purposeful, actionable and measurable. But are they achievable? Can the strategic plan be implemented? Traditional approaches to strategic planning can fail to identify structural deficiencies that can hinder operationalizing the strategic plan, thereby failing to achieve identified goals. The result can be a series of unintended consequences of dealing with lack of qualified staff, ineffective workflows, lack of skills, technology, equipment, or funding needed to successfully implementation the plan.

THE BALANCED SCORE CARD

A strategic planning and management system



The Balanced Scorecard, first introduced by Robert S. Kaplan and David P. Norton in 1992, tracks the key elements of your strategy by describing how goals are achieved and measured. The four different perspectives in the Balanced Scorecard address questions related to how customers see us, what we must excel at, how we can continue to improve and create value, and how we look to our stakeholders.

When applying the Balanced Scorecard, managers can look at performance from four different perspectives, and a snapshot of linked performance metrics. The focus on specific measures targets relevant activities and minimizes information overload. The four perspectives also have the potential of improving communication between different managers and teams involved.

ADAPTING THE BALANCED SCORECARD FOR LIBRARIES

Unlike for-profit corporations, libraries, which are service organizations and not-for-profit, typically move the Customer Perspective to the top, as the final outcomes or results have an impact on improving or enhancing customer service or satisfaction.

| Stakeholders' Perspective | | | | | | |
|---|--|--|--|------------------|--|--|
| Administration | | Internal Patrons | | External Patrons | | |
| Best practices in academic library management | | Timely, multiple access points to relevant, quality scholarly information resources and services | | Collaboration | | |
| Leadership | | Library as the information source of choice | | Leadership | | |

| Internal Perspective | | | | Learning and Growth | | |
|--|---|---|--|---------------------------|----------------------------|---|
| Staffing | Collections/Resources | Services | Technology | Human Capital | Technoloey Capital | Organizational Culture |
| Processes to create value to stakeholders by recruiting and training qualified staff; Talent management; Knowledge Management. | Processes to create value to stakeholders by developing, implementing, and assessing diverse content in a distributed, electronic environment | Processes to create value to stakeholders by planning, developing, implementing and assessing diverse services in a distributed, electronic environment | Plan and implement appropriate technologies to support Library's diverse electronic collections and services | Skills Training Knowledge | Systems Databases Networks | Culture, Leadership, Alignment, Shared Values |

| Financial Perspective | |
|--|--|
| Cost break down of eResources, new acquisitions, IT and staffing | Enhance stakeholders' value opportunities in collections, services and IT delivery |
| Investment in human capital | Talent management Knowledge management |
| Reports on Activity Based Costing | Funding innovative new services |
| Accurate tracking and reporting of prgr support | Support new academic curricula and programs |

Source: *Sayed, E.N. (2013)*

RESULTS

| BALANCED SCORECARD FOR INFORMATION LITERACY INSTRUCTION IN AN INQUIRY-BASED CURRICULUM | | |
|--|---|--|
|  | | |
| Customers: Students | | |
| Internal Processes that we must succeed at to fulfill the Value Proposition: Information Literacy Teaching/Knowledge sharing Relationship building | Value Proposition: Librarians will teach students how to apply information literacy skills in an inquiry-based curriculum. Librarians will achieve this by enhancing their skill set and collaborating with teaching faculty. | Learning and Growth: Infrastructure required to achieve the Value Proposition: Human Capital (Librarians) Knowledge Skills Training Information Capital Bibliographic Databases Organizational Culture Leadership Alignment Teamwork |
| Financial: Cost to fill public services librarians' knowledge gap. | | |

| BALANCED SCORECARD FOR TEACHING, LEARNING AND RESEARCH TO MEET COMMUNITY NEEDS IN NEW EDUCATION CURRICULUM AREAS OF FOCUS | | |
|--|--|---|
|  | | |
| Customers: Students, Faculty, Administrative Staff | | |
| Internal Processes that we must succeed at to fulfill the Value Proposition: Operations Management Subject development Teaching/Knowledge sharing Relationship building Partnerships with curriculum committees Liaison outreach | Value Proposition: The library will develop and execute a plan to satisfactorily meet the community's needs for teaching, learning, and research in four areas of focus: 1. Health equity 2. Social justice in medicine 3. Environmental medicine 4. Life sciences | Learning and Growth: Infrastructure required to achieve the Value Proposition: Human Capital (Librarians & Staff) Knowledge Skills Training Information Capital Bibliographic Databases E-book Collection Expansion Organizational Capital Culture Leadership Alignment Teamwork |
| Financial: Cost to grow collections, staff training | | |

DISCUSSION AND CONCLUSIONS

At the Medical College of Wisconsin Libraries, the Balanced Scorecard provided the focus necessary to address level of readiness to provide library instruction in the new inquiry-based curriculum.. A faculty member presented to library staff on the new curriculum and introduced librarians to course directors. The public services team established that the critical skills required of them to teach in the inquiry-based curriculum include Evidence-Based Medicine (EBM), instructional design, assessment using a rubric, facilitation, and Entrustable Professional Activities (EPA).

The result of a self-assessment showed that overall, the team is 52% ready to teach in the inquiry-based curriculum, showing a knowledge gap of 48%. The widest knowledge gap is in EPAs (80%), followed by facilitation and instructional design (60%), assessment and EBM (20%). A professional development plan and cost estimate were developed for each librarian.

At Stanford's Lane Medical Library, the Balanced Scorecard is being used to apply processes to a *previously-developed* strategic plan. In addition to expanding the library's tangible assets, i.e., the library collections, to reach the goal of supporting new curricular areas it is critical to develop intangible assets. These intangible assets include increased awareness of the mission and values of the Stanford School of Medicine (SOM) and improved communication between the Med Ed Librarian and SOM Curriculum Committees, library leadership, and library liaisons. Formal values training for all library staff will be undertaken and an informal lunch and learn session focused on the new curriculum areas will be held. Enhancements of existing technology and expanded training in technical tools for targeted collection development, as well as the development of a targeted marketing strategy, are other components that will be considered as part of a full team assessment.

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