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 implement the plan.

THE BALANCED SCORECARD

A strategic planning and management system

- Human Capital
- Infrastructure & Technology
- Organizational Culture

Customer

Balanced Scorecard

Internal Processes

- Customer Value
- Satisfaction and/or Retention

- Efficiency
- Quality

Financial

- Financial Performance
- Effective Resource Use

Learning & Growth

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.

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 (55%). The 20%-based curriculum, showing a 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.

REFERENCES


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Katie Stinson, Library Specialist, Lane Medical Library, Stanford School of Medicine

Ashley Zeidler, Reference Librarian, Medical College of Wisconsin

Robert N. Sayed, M.S., 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

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 necessary to address 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 implement the plan.

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 necessary to address 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 implement the plan.