Balanced Scorecard
at the
Hesburgh Libraries
University of Notre Dame

ARL Membership Meeting
May 2012
Why?

• ND: to gain experience with library-wide and ongoing assessment

• UVa Experience: a Decade with Balanced Scorecard:
  – Track progress on key areas
  – Demonstrate Library value to institution
  – Focus attention on areas to improve
  – Articulate our specific institutional values
Notre Dame Foundations

Strategic Assessment Document

14 Themes and Goals

SWOT

Balanced Scorecard

4 Perspectives

12 Objectives
University of ND Goals

• Offer an unsurpassed undergraduate education
• Become a preeminent research university
• Ensure that the University’s Catholic character informs all its endeavors
• Create a sustainable culture of continuous improvement and service excellence to support the University’s mission
• Communicate strategically to internal and external constituents
DPW Prioritizing Framework

Three Guiding Principles

- Customer service
- Make changes that improve customer service
- Results matter

Three Areas of Focus

- Services and expertise
- Knowledge resources
- Library spaces
MAKING ORDER FROM CHAOS

3 Guiding Principles

Strategic Assessment

3 Areas of Focus

3 Guiding Principles

University Goals

Balanced Scorecard

Strategic Plan
## Aligning with ND Goals

<table>
<thead>
<tr>
<th>Library Goal</th>
<th>University Goal</th>
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<tr>
<td>• Advance research &amp; scholarship</td>
<td>• Become a preeminent research university</td>
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<td>• Enrich educational experience &amp; intellectual growth</td>
<td>• Offer an unsurpassed undergraduate education</td>
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<td>• Heighten the value and impact of the Libraries by developing digital programs &amp; services</td>
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<td>• Transform library spaces to foster and inspire intellectual engagement</td>
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To contribute to the mission of the University by providing distinctive collections, services, tools, and spaces that enhance learning, teaching, and research for, and in collaboration with, the University community.

Values: Customer Service, Continuous Improvement, Change, Collaboration, Commitment to Excellence

**Hesburgh Libraries: Committed to Service Excellence**

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**Advance Research & Scholarship**
- Identify, fund, build, describe, maintain, and preserve collections aligned with ND’s established research programs and emerging academic areas.
  - Create and implement a plan to respond to emerging subject areas.
  - Develop and implement a policy for preservation of digital collections.

**Enrich Educational Experience & Intellectual Growth**
- Support discovery by providing easy and expert access to resources & services and informed by user input.
  - Implement a streaming media service for the University.
  - Improve IUL/DCC Delivery Interface.

**Heighten the value and impact of the Libraries by developing digital programs and services**
- Grow nascent digitization capacity to expand access to ND collections.
  - Create a formal digitization program with additional focused staff, with skill sets including specialized metadata planning and project management skills.
  - Identify and define in-house skills and increase skill capacity of current staff.

**Transform Library Spaces**
- Develop a Master Space Plan for Hesburgh Libraries
  - Identify partners within the Libraries to collaborate with campus partners and professional consultants to develop a master plan.
  - Develop a master plan for the Libraries that supports and advances the University’s academic mission.

**Create a sustainable culture of continuous improvement and service excellence in support of the University’s mission**
- Steward our resources in alignment with campus priorities.
  - Develop, implement, and communicate a plan for a more thoughtful budget.

- Provide appropriate organizational support, personnel, and infrastructure for efficiency and effectiveness.
  - Develop, implement, and communicate a plan for reorganization.

- Create a more flexible, responsive, and well managed organization with a strong customer service ethic.
  - Identify the components of “service excellence” and develop a customer service program accordingly.
  - Infuse the components of “service excellence” into 4 key library-wide initiatives.

- Communicate regularly and strategically with internal and external constituencies.
  - Conduct an internal communications audit.
  - Recruit and hire a communications specialist.
ND football motto
Coach Lou Holtz had this sign hung on the wall ND football players pass on their way from the locker room to the stadium.
ND Library motto
ND Balanced Scorecard team adaptation
Strategic Change Agenda:
University of Notre Dame Libraries

**Focus**
- Engaging with students and faculty
- Reflects university priorities and library strategic goals

**Structure**
- Reflects internal functions
- Measures of Success
  - Traditional input measures
  - Impact

**Change Management**
- Incremental
- Transformative

**Outreach**
- Disconnected and random
- Deliberative and strategic

**Decision Making**
- Top Down
- Distributive and pushed down

Past (from....) -> Future (to...)