

OUTCOMES, VALUE & IMPACT:
METRICS FOR LIBRARY SUCCESS

MANAGEMENT
FRAMEWORKS

JOE MATTHEWS
USC, OCTOBER 2015

ORGANIZATIONAL EFFECTIVENESS

- Goal Model
- Internal Process Model
- Open Systems Model
- Multiple Constituencies Model

BARRIERS TO STRATEGIC IMPLEMENTATION

The Vision Barrier

Only 5% of staff members
understands the strategy

The People Barrier

Only 25% of managers have
incentives linked to strategy

The Management Barrier

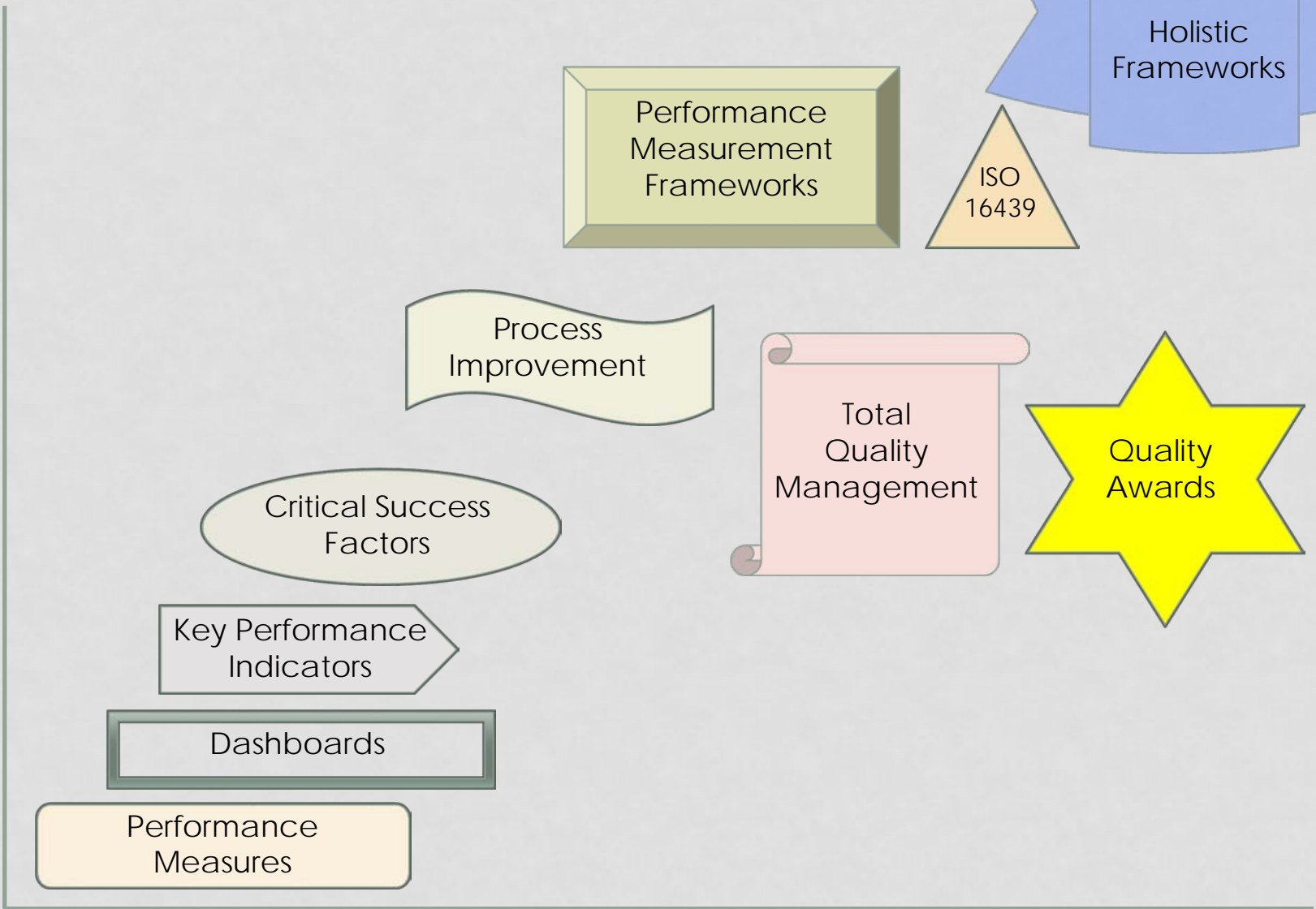
85% of top management teams
spend less than 1 hour
per month discussing strategy

The Resource Barrier

60% of organizations don't link
budgets to strategy

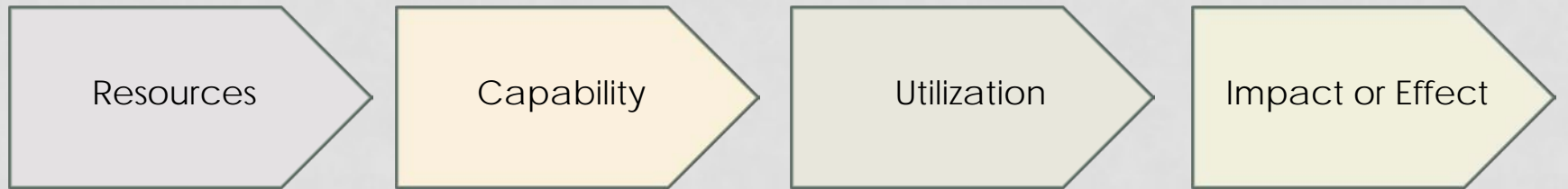


Complexity
of Analysis



Importance

PERFORMANCE MEASURES



Input measures

Process measures

Output measures

Outcome measures

What has changed in
the life of the customer?

OUTCOMES



Short-term

Learning

Awareness
Attitudes
Knowledge
Skills
Opinions
Aspirations
Motivations



Intermediate

Persistent Action

Behavior
Practice
Policies
Decision-making
Social action



Long-term

Conditions

Social
Economic
Civic
Environment

Short term outcomes

Intermediate outcomes

Long term outcomes

Library
Services,
Programs &
Resources

Knowledge
& Learning

Enjoyment

Participation

Cognitive Skills Development

Speech, language & communication literacy
Other basic skills (IT, numeracy, health literacy)
Business & Career management skills

Non-Cognitive Skills Development

Personal, Social & Emotional skills

Well Being & Health

Self management abilities
Reduce social isolation
Happiness & improved mental well being

Social Capital Formation

Participation & volunteering
Social networks & relationships
Awareness of external services & benefits

Higher earnings
Improved employability
Economic growth
Better physical & mental health
Reduced crime rates

Improved employability
Maintain relationships

Increased life expectancy
Better quality of life
Reduced costs of health & social care

Reduced anti-social behavior
Reduce crimes & fear of crime

48,224

Fans

Fans on Facebook

Number of the IMA's Fans on Facebook

SEP 2, 2014

[MORE](#)

10,180

memberships

IMA Member Households

Active member households.

APR 16, 2014

[MORE](#)

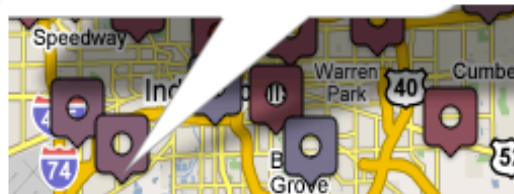
\$326,327,451

Total Size of the IMA's Endowment

The year to date (June 30, 2012) gross value of the IMA's endowment.

NOV 7, 2012

[MORE](#)



Museum Admissions

An interactive map of admissions by zip code

[MORE](#)

360,767

visits

Attendance YTD

Visitors to the IMA this year.

[MORE](#)

Today's attendance

678

entrances

Today's attendance

The number of people who have entered the

[MORE](#)

KEY PERFORMANCE INDICATORS

- 5 year graduation rate
- Retention rate
- Acceptance rate by graduate schools

- Reduced unemployment rate
- Increased high school attendance/graduation
- Improved kindergarten readiness

CRITICAL SUCCESS FACTORS

Activities and capabilities that define the **continuing success** of an organization

Staff competencies

Service quality

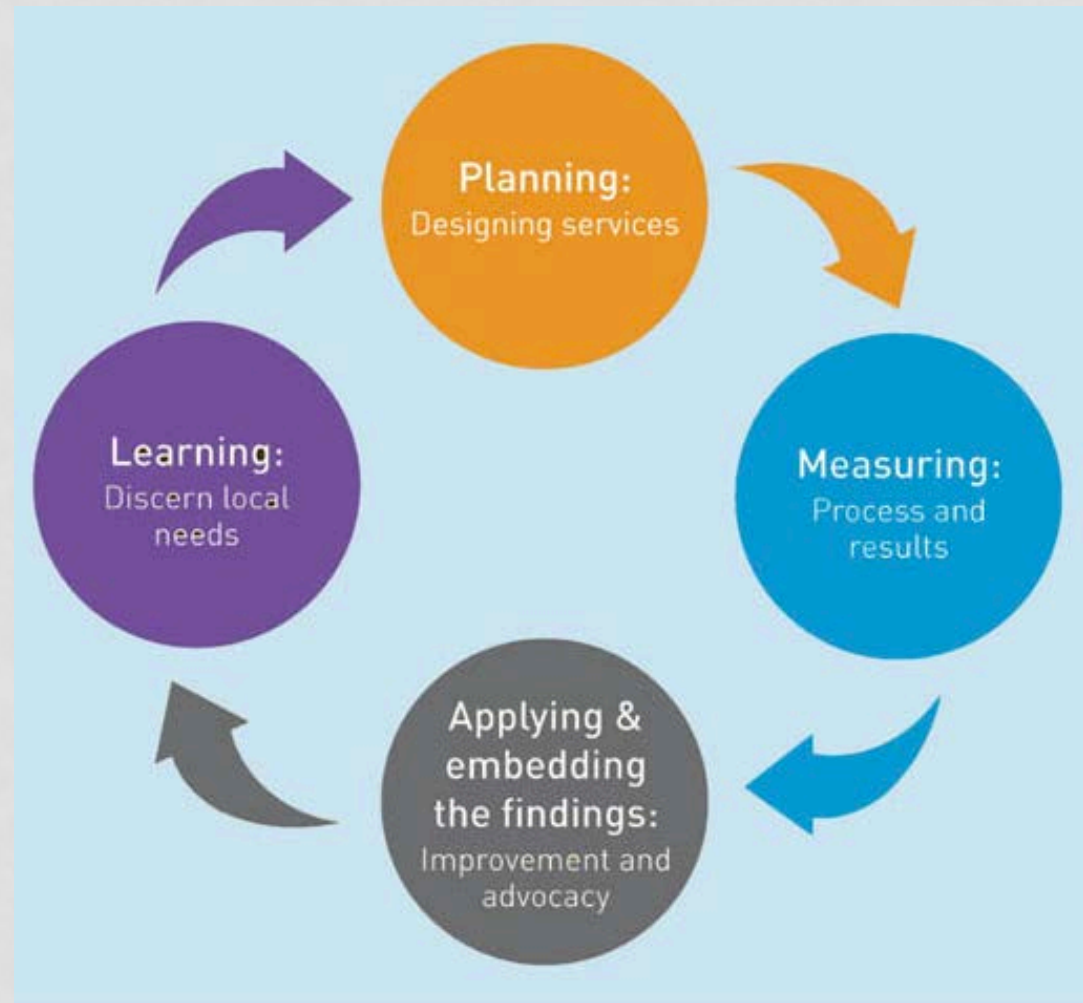
Customer satisfaction

Community

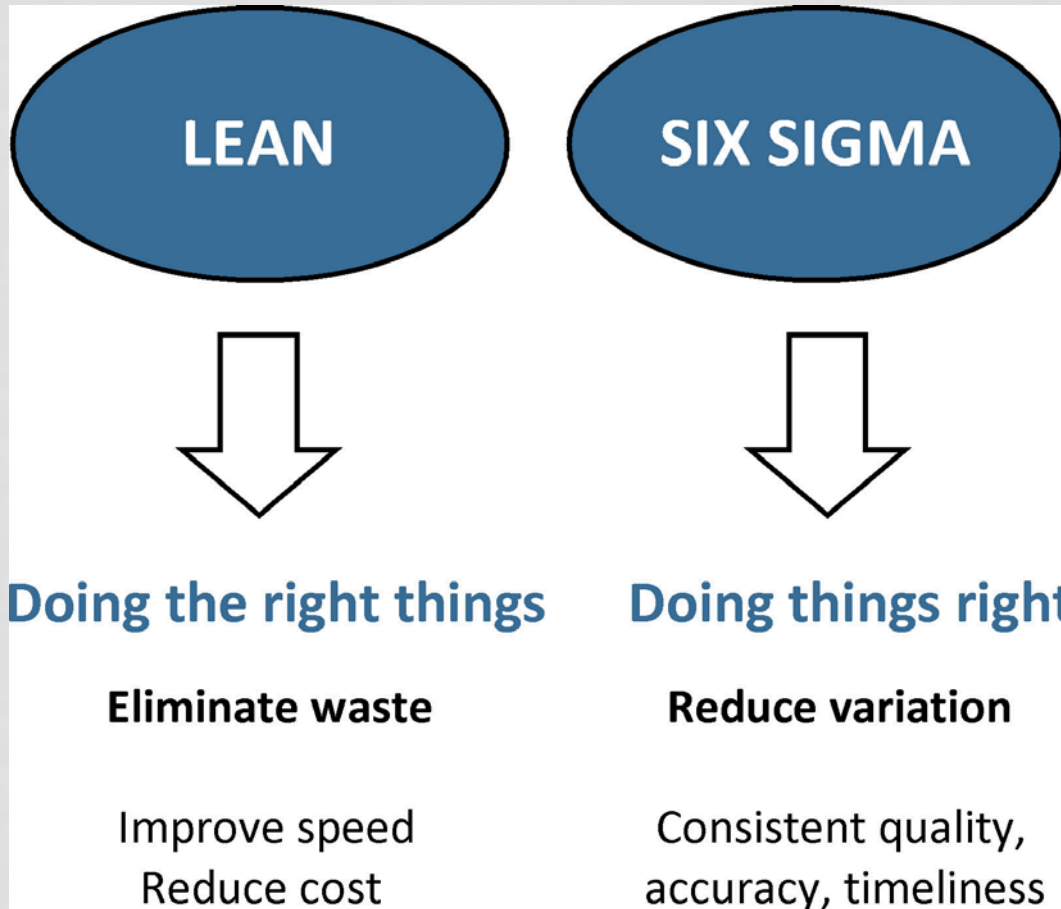
engagement

Innovation

PROCESS IMPROVEMENT



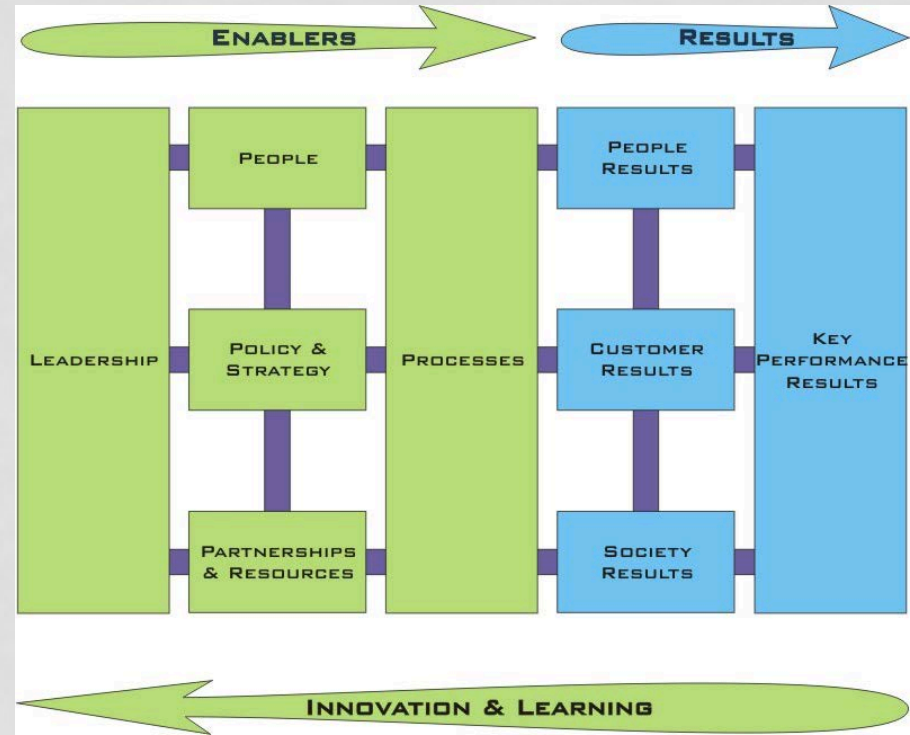
PROCESS IMPROVEMENT



QUALITY AWARDS



Malcolm Baldrige Excellence Framework



European Foundation for Quality Management Business Excellence Models

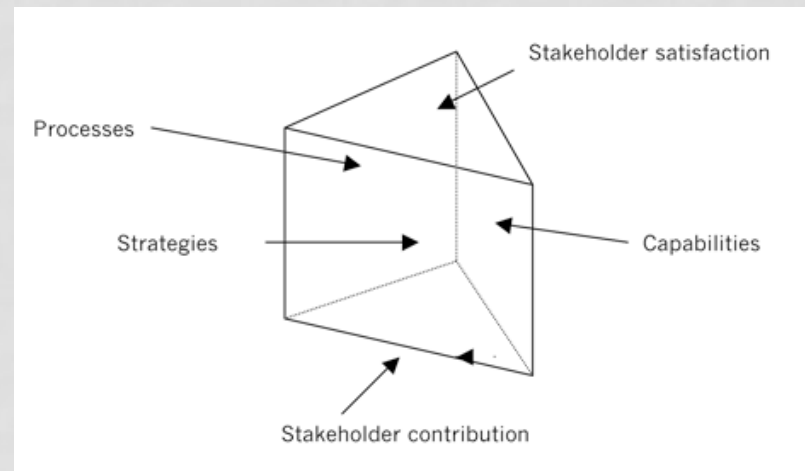
PERFORMANCE MEASUREMENT FRAMEWORKS

	Dimensions of Performance	Types of Measures
D E T E R M I N A N T S	Quality of service	Reliability Responsiveness Aesthetics/Appearance Cleanliness/Tidiness Comfort Friendliness Communication Courtesy Access Availability Security
	Flexibility	Volume flexibility Delivery speed flexibility Specification flexibility
	Resource utilization	Productivity Efficiency
	Innovation	Performance of the innovation process Performance of individual innovations
R E S U L T S	Competitiveness	Relative market share and position Sales growth Measures of the customer base
	Financial performance	Profitability Liquidity Capital structure Market ratios

Service Performance Framework

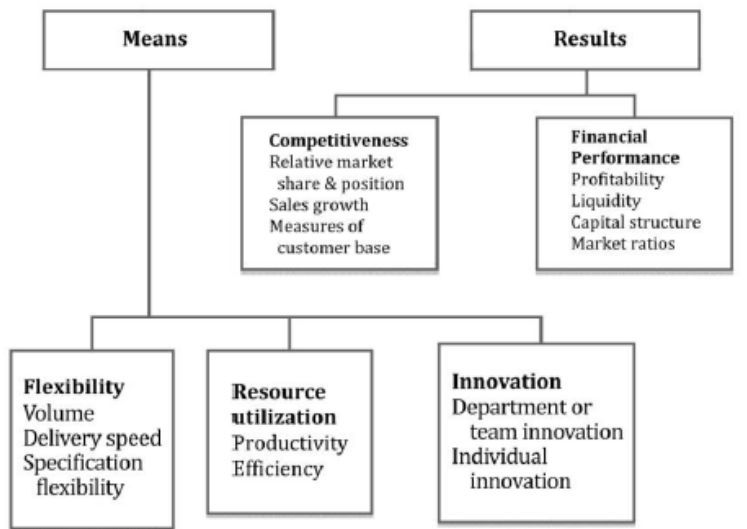


Performance Pyramid

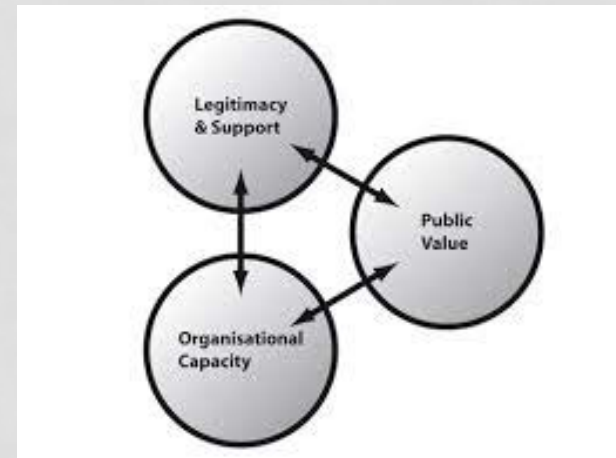


Performance Prism

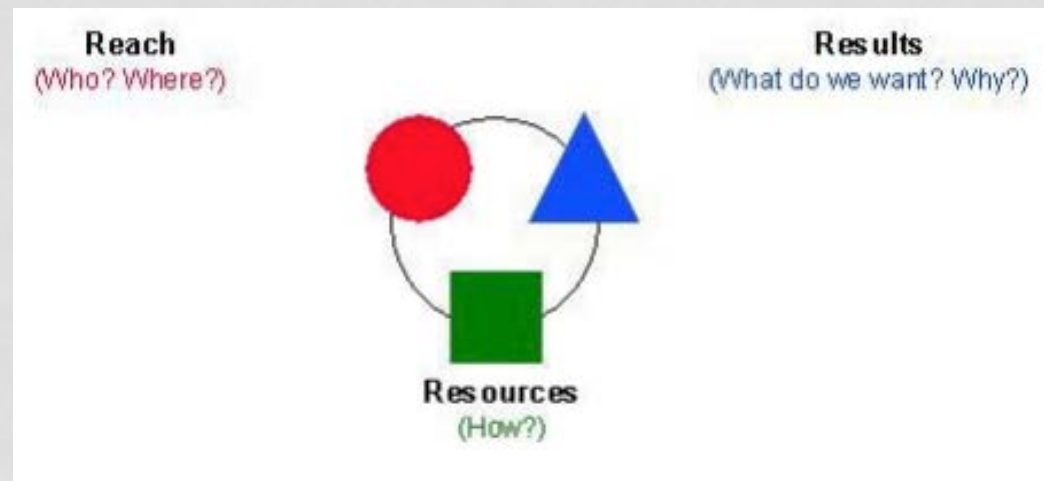
HOLISTIC FRAMEWORKS



Results & Determinants Matrix



Strategic Triangle



3 Rs of Performance

HOLISTIC FRAMEWORKS

Enablers	Results
<p><i>Direction</i></p> <p>Governance Purpose Strategy & Policy Staffing Culture Legislation & Regulation</p>	<p><i>Stakeholder Satisfaction</i></p> <p>People We Help Paid Staff Volunteers Funders Partners Influencers</p>
<p><i>Processes</i></p> <p>Planning Managing People Managing Money Managing Other Resources Managing Activities Monitoring & Review</p>	<p><i>Positive Impact</i></p> <p>Strategic Outcomes Financial Health Evidence of Standards Development Public Profile Impact on Society</p>



Social Return on Investment

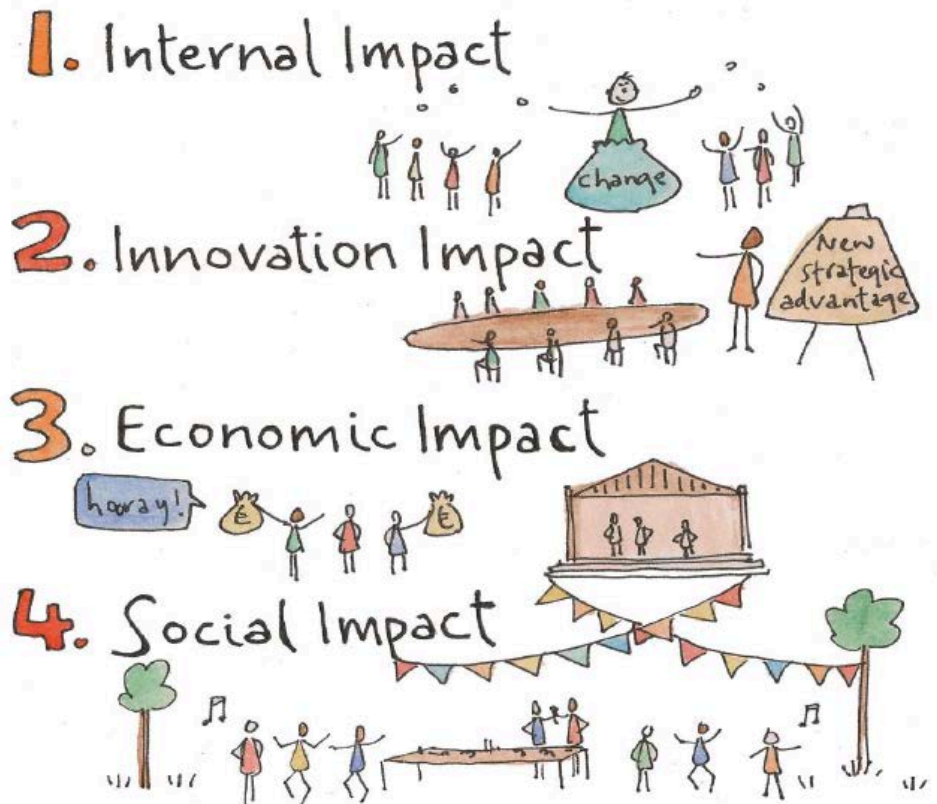
The Big Picture

HOLISTIC FRAMEWORKS

<p>COLLABORATE</p> <p>Empowering employees to get results</p>	<p>CREATE</p>
<p>CONTROL</p> <p>Cutting red tape Cutting back to basics</p>	<p>COMPETE</p> <p>Putting customers first</p>

Competing Values Framework

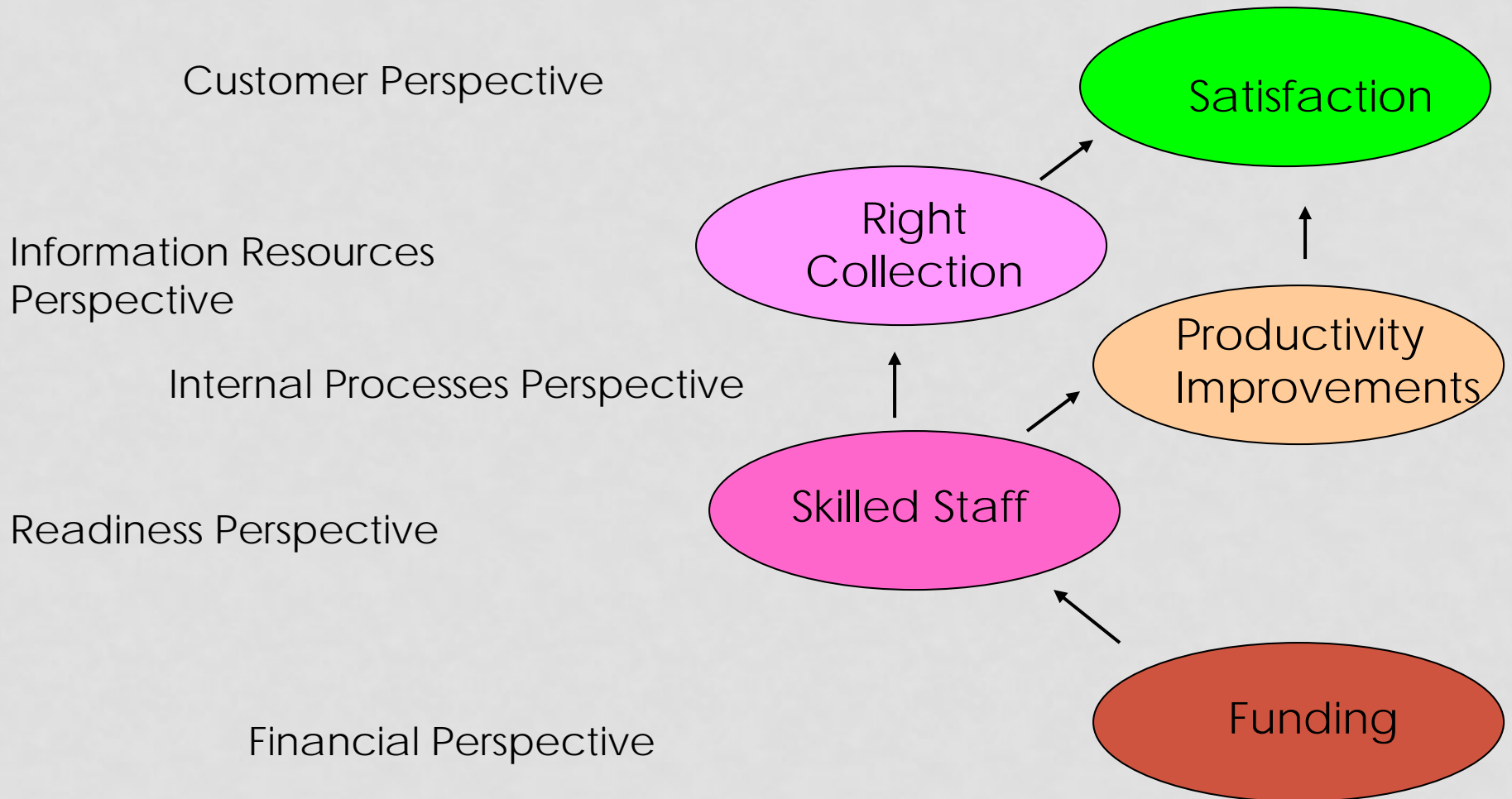
The Balanced Value Model



BALANCED SCORECARD



SCORECARD STRATEGY MAP



SCORECARD CHALLENGES

- **No linkage** of performance measures to the strategic plan
- **Organizational resistance** – tension between stability and innovation
- Tension between strategy and operations
- Reluctance to embrace “**stretch**” targets
- **Department “silo” mentality** versus organizational goals linked to strategy
- Too many measures
- Focus on **measures that matter** and recognize these will likely change over time
- Involvement of **leadership** is crucial
- Scorecard is **a management tool** and not a container for performance measures

	EXTERNAL INPUT		MEANS		CUSTOMER INTERACTIONS			ENDS
Collins Hedgehog Concept		Passion	Unique capability	Drive the resource engine			Superior performance	
Orr's I-P-O-O Model	Inputs		Process		Outputs		Outcomes	
Logic Model			Input & resources	Activities	Outputs	Outcomes Impact		
Evaluation Projects	Intended Impact		Inputs needed	Activities generated	Outputs	Outcomes Impact		
3 Rs	Resources		Reach			Results		
Strategic Triangle	Authorizing Environment			Organizational Capacity			Public value	
Results & Determinants	Resource utilization		Flexibility	Innovation		Results		
The Big Picture	Direction	Processes		Stakeholder Satisfaction			Positive Impact	
SROI						Social, Financial & Ecological		
Competing Values	Control	Compete	Collaborate		Create			
Balanced Value Model						Internal Impact	Innovation, Social & Economic Impact	
Balanced Scorecard	Financial Perspective		Internal Processing		Learning & Growth		Customer Perspective	
Summary Categories	Community Needs	Intentional Purposes	Guiding Principles	Resources	Activities	Operating Data	KPIs	Perceived Value

SELECTING A FRAMEWORK



- Fair accomplishi
- Focus
- Perspective
- Resonate

ASSESSING VALUE

Guiding principles

1. Determining value requires a **multi-prong approach** – quantitative & qualitative, social, economic and public value perspectives
2. Recognize that assessing the value of the library in the life of individuals and the community requires us to **focus on outcomes**
3. A **management framework** can help present a more comprehensive picture of value
4. There is no silver bullet – recognize that determining value is an **iterative process**

VALUE CHALLENGES

- Do not **set targets**
- No understanding of **stakeholder value measures**
- Measures are **not integrated** into programs and services
- **Outcomes confused** with outputs – value measures are not operating measures
- **No responsibility** for managing measures

THE BOTTOM LINE

How the library contributes
to the achievement of
organizational goals!

Or, it should be!

The image shows the front cover of a book. The cover is a dark, textured blue color. In the center, the words "DISCUSSION" and "QUESTIONS" are printed in a large, gold, serif font, stacked one above the other. The text is surrounded by a decorative gold border consisting of a series of interconnected diamond shapes. The book is set against a light gray background.

DISCUSSION QUESTIONS

Joe AT JoeMatthews.Org

RESOURCES

Moe Hosseini-Ara and Rebecca Jones. Overcoming Our Habits and Learning to Measure Impact. *Computers in Libraries*, 33 (5), June 2013.

Joseph Matthews. Assessing Organizational Effectiveness: The Role of Performance Measures. *Library Quarterly*, 81 (1), 2011, 83-110.

Joseph Matthews. *Scorecards for Results: A Guide for Developing a Library Balanced Scorecard*. Westport, CN: Libraries Unlimited, 2008.