

University of Virginia Library

Balanced Scorecard Results

2002-2010



Strategic Assessment Services

Balanced Scorecard Summary FY2002

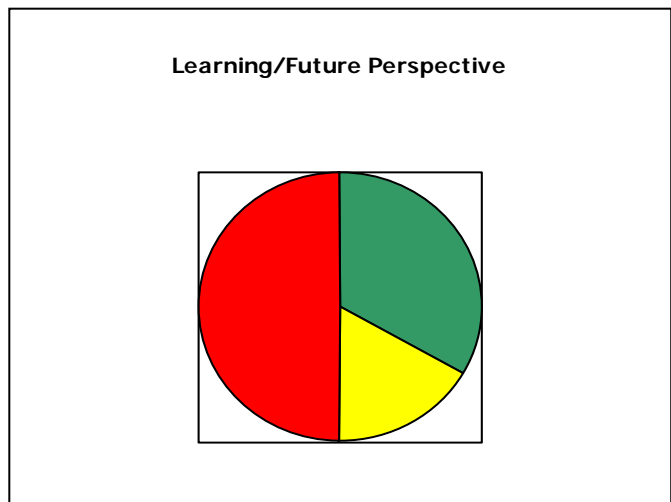
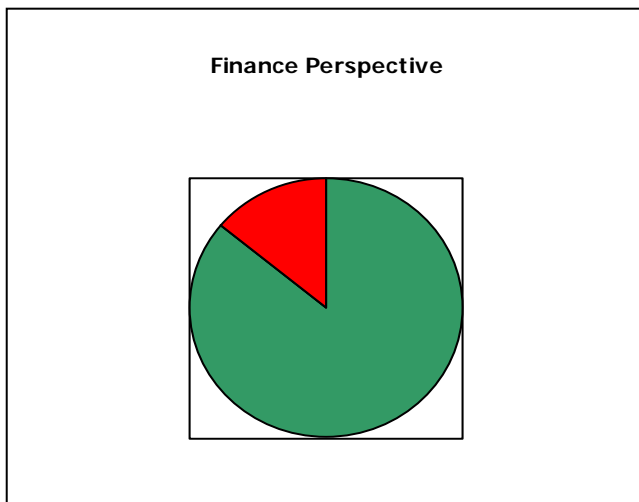
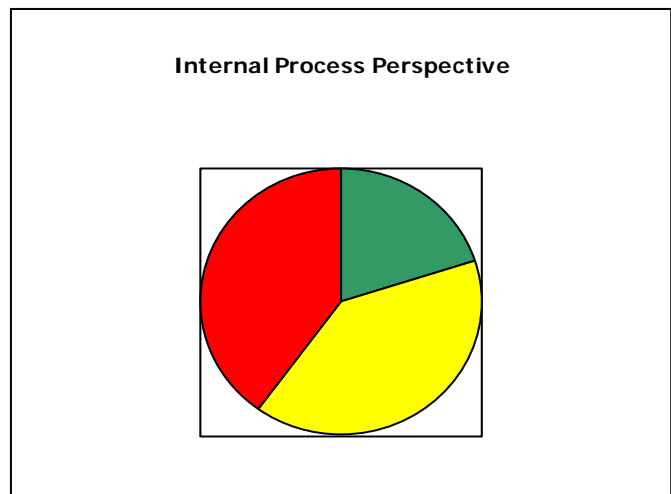
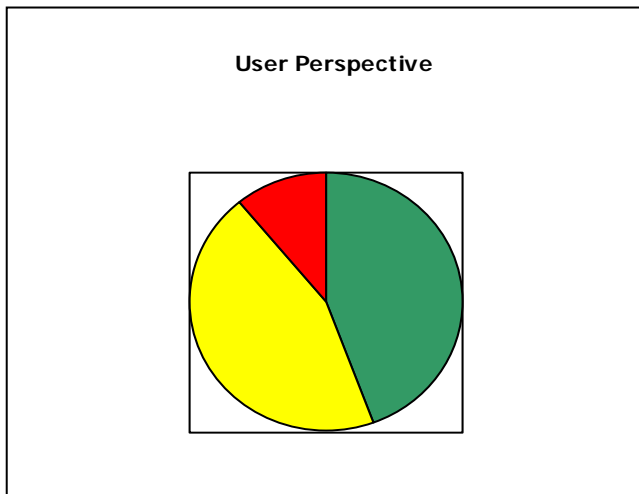
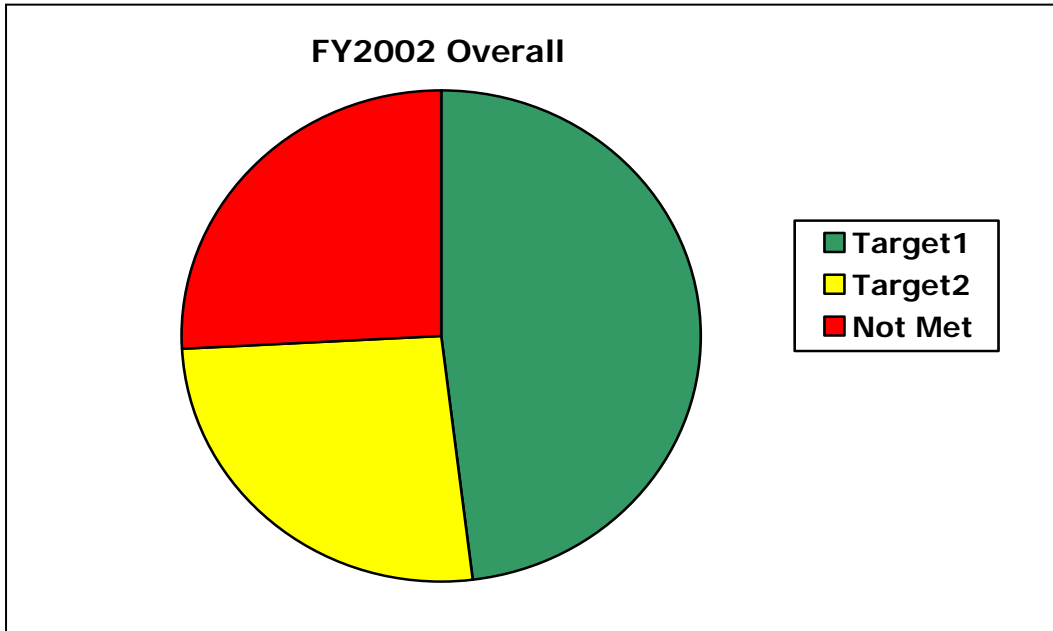
	Target 1 Met	Target 2 Met	Targets Not Met	Metrics Not Measured	Composite Score
User Perspective	I: Overall Survey: faculty	II Customer Service Rating	V Special Collections attendance	VI Circulation of new monographs: electronic	
	I: Overall Survey: students	III ARL Index Ranking		VII: Turnaround time: LEO	
	VII Turnaround time: searches	IV Instruction Rating		VII: Turnaround time: ILL	
	VII Turnaround time: recalls	VI Circulation of new monographs:print		VII: Turnaround time: Toolkit	
				VII: Turnaround time: new books	
Subtotal	4	4	1	5	0.33
Internal Process	XII Process Improvement	VIII Processing time for routine acquisitions	IX Shelving time and quality		
		X Service to internal customers	XI Departmental assessment plans		
Subtotal	1	2	2	0	-0.20
Finance	XIII Non-State Expenditures		XV Used mono/total mono	XVI Unit cost of serial use: electronic	
	XIV Library budget/Univ budget			XVI Unit cost of serial use: paper	
	XVII Unit cost of database use			XXIX Unit cost of public services: circ	
	XVIII Unit Cost of Cataloging			XXIX Unit cost of public services: ref	
	XVIII Unit Cost of Acquisitions			XXIX Unit cost of public services: user ed	
	XVIII Unit Cost of ILS				
Subtotal	6	0	1	5	0.71
Learning/Future	XXI Retain commended staff	XX Develop learning plans	XXIV Expends for digital material	XXII Equipment Reliability	
	XXIII Renovations		XXV Website usability testing		
			XXVI Increase digital access		
Subtotal	2	1	3	1	-0.17
Grand Total	13	7	7	11	0.22

Suspended Metrics

Metrics included for 02/03

Metrics Deleted

**Balanced Scorecard
University of Virginia Library
FY2002 Results**



Balanced Scorecard Metric Results for FY2001/02

METRIC I: OVERALL RATING IN STUDENT AND FACULTY SURVEYS.

Target1: Score of at least 4.0 (out of 5) from each of the major constituencies (undergraduates, graduates, humanities faculty, social sciences faculty, science faculty).

Target2: Score of at least 3.9 from each major constituency.

Separate tallies for faculty and students.

Result for Faculty for FY2002: **Target1 achieved.**

2000 Faculty survey—overall ratings

Science faculty 4.14

Humanities faculty 4.48

Social Sciences faculty 4.60

Result for Students for FY2002: **Target1 achieved.**

2001 Student survey—overall ratings of primary library

Undergraduates 4.19

Graduate students 4.11

METRIC II: CUSTOMER SERVICE RATINGS IN STUDENT AND FACULTY SURVEYS.

Target1: 4.25 Mean For Both Groups

Target2: 4.00 Or Better For Both Groups

Separate tallies for faculty and students. Three variables (competence and knowledge of staff, courtesy of staff, speed of service) combined into one metric.

Result for FY2002: **Target2 Achieved.**

2001 Student survey-combined customer service rating.

Undergraduates 4.18

Graduate students 4.29

METRIC III. ARL INDEX RANKING.

Target1: The UVa Library should rank in the top 20.

Target2: The UVa Library should remain ranked in the top 25.

Result for FY2002: **Target2 achieved.**

2001 ARL index ranking is 22

(<http://fisher.lib.virginia.edu/arl/index.html>)

METRIC IV. OVERALL INSTRUCTION RATING IN USER EDUCATION PARTICIPANT SURVEY.

Target1: An overall rating of 4 on a scale of 1 to 5.

Target2: An overall rating of at least 3.8.

Result for FY2002: **Target2 achieved.**

The rating for ENWR and TCC (first year) classes was 3.81 out of 5. The overall rating for ten upper division classes was 3.89 out of 5.

METRIC V. ATTENDANCE AT SPECIAL COLLECTIONS SESSIONS.

Target1: Increase by 20% annually the number of informational, instructional, and outreach sessions and the number of persons attending sessions in Special Collections.

Target2: Increase by 10% the number of sessions and the number attending.

Result for FY2002: **Failed to Meet Target1 or Target2.**

	2000/01	2001/02	% Change
Events	203	197	-2.96%
Participants	2,728	2,438	-10.63%

METRIC VI. CIRCULATION OF NEW MONOGRAPHS.

Target1: 60% of all newly cataloged monographs (excluding reference books and other non-circulating materials) should circulate to UVa patrons within two years of the time of cataloging. Newly acquired or newly digitized electronic monographs will be included as part of this target.

Target2: 50% of all new titles should circulate (or be used) within the first two years.

Separate Tallies: The numbers for print material and digital materials will be kept and reported separately.

Result for FY2002: **Target2 met for print materials.**

Books purchased: 28,030

Books circulated: 16,152

Percent of new books that circulated: 57.6%

METRIC VII. TURNAROUND TIME FOR PROCESSING AND FILLING USER REQUESTS.

Target1: Satisfy the turnaround targets 90% of the time.

Target2: Satisfy the turnaround targets 80% of the time.

Categories:

Searches: Notify patron of results of search within 4 days of request.

Recalls: Process requests within 1 day.

ILL: Fill requests in 7 days.

LEO: Fill requests in 7 days.

Toolkit: Fill requests by agreed upon date.

New Books: Fill requests in 7 days.

Report separate tallies for each category.

Result for Searches FY2002: **Target1 achieved.**

Patrons were notified of search results within 4 days 94.6% of the time from November 2001 through June 2002.

Result for Recalls FY2002: **Target1 achieved.**

92.6% of recall requests were placed within 24 hours.

Toolkit database was updated so that we can extract turnaround data beginning July 2002; process for collecting data for new books is in place for next year; database with ILL and LEO data may not yield the data we need.

METRIC VIII. PROCESSING TIME FOR ROUTINE ACQUISITIONS.

Target1: 90% of in-print books from North America will be processed within one month.

Target2: 80% of in-print books from North America will be processed within one month.

Result for FY2002: **Target2 met.**

Number processed within 1 month = 11,626

Total number processed = 13,123

Percent processed within 1 month = 88.6%

METRIC IX. TURNAROUND TIME FOR SHELVING BOOKS.

Target1: Shelve 90% of items within 4 hours of their return to the home library's circulation desk with an average accuracy rate for each library of 98%.

Target2: Shelve 90% of items within 6 hours of their return to the home library's circulation desk with an average accuracy rate for each library of 98%.

Result for FY2002: **Failed to Meet Target1 or Target2.**

39.6% of items were shelved in 4 hours
51.7% of items were shelved in 6 hours

Overall turnaround time for all libraries was 11:42 hours. Quality checking program was not implemented. Metric was revised for FY2003.

METRIC X: STAFF SURVEY RATING OF INTERNAL SERVICE ACTIVITIES.

Target1: Composite rating of 4.0 of all internal service activities in annual staff survey, with no units rated below 3.5.

Target2: Composite rating of 3.5, with no units below 3.0.

Result for FY2002: **Target2 achieved.**

Composite rating of 3.85.
Lowest unit rating of 3.22, highest of 4.45.
96 responses received.

METRIC XI. PERCENTAGE OF DEPARTMENTS WITH AN ASSESSMENT PLAN.

Target1: 100% participation.

Target2: 80% participation.

Result for FY2002: **Failed to Meet Target1 or Target2.**

12 plans were turned in for 23 departments/units for a 52.2% response rate.

METRIC XII. PROCESS IMPROVEMENT.

Target1: Complete at least one major process improvement each year.

Target2: Complete at least one major process improvement every two years.

Result for FY2002: **Target1 achieved.**

Centralization of student and wage pay processing qualifies for this year.

METRIC XIII. NON-STATE EXPENDITURES AS A PROPORTION OF TOTAL UNIVERSITY LIBRARY EXPENDITURES.

Target1: The target for FY2002 will be 10%. The target will increase by one half of one percent each year, i.e., the target for FY2003 will be 10.5%, for FY2004 it will be 11% etc.

Target2: The partial success indicator for FY2002 will be 9%.

Result for FY2002: **Target1 achieved.**

Total expenditures for FY02 = \$20,770,301
Expenditures from non-state sources = \$2,079,295 or 10.011%.

METRIC XIV. LIBRARY BUDGET AS A PROPORTION OF THE UNIVERSITY BUDGET.

Target1: The University Libraries should continue to account for at least 4% of the E&G (educational and general) share of the University budget.

Target2: The University Libraries should account for at least 3.75% of E&G.

Result for FY2001: **Target1 achieved.**

University of Virginia E&G total expenditures:	\$641,358,072
University of Virginia Libraries expenditures	\$ 26,939,896
Library budget proportion of total E&G	4.20%

METRIC XV. EXPENDITURES FOR MONOGRAPHS THAT CIRCULATE AS A PROPORTION OF ALL MONOGRAPHIC EXPENDITURES.

Target1: Monographs that circulate within the first two years should account for at least 70% of the monographic budget.

Target2: The circulated items should account for at least 60% of the monographic budget.

Result for FY2002: **Failed to Meet Target1 or Target2.**

Total cost of books in sample:	\$995,724.77
Cost of books that circulated:	\$571,449.69
Circulated books =	57.4% of the total cost.

METRIC XVI. UNIT COST OF SERIAL USE (PAPER AND ELECTRONIC)

Target1. 0% increase in unit cost each year.

Target2. Less than 5% increase in unit cost each year.

Separate Tallies: The numbers for print journals and electronic journals will be kept and reported separately.

Result for FY2002: **Baseline established for electronic serials.**

\$2.12 per electronic article
Articles displayed: 684,517 Cost: \$1,452,485

METRIC XVII. UNIT COST OF ONLINE DATABASES.

Target1: 0% increase in unit cost each year.

Target2: Less than 5% increase in unit cost each year.

Result for FY2002: **Target1 achieved.**

Cost: \$518,358. Searches: 1,305,466.
Cost for FY02 is \$.40 per search, the same as FY01.

METRIC XVIII. UNIT COST OF PROCESSING LIBRARY MATERIALS.

Target1. Annual percent increase in unit cost to be equal to or less than annual percent increase in overall library operating expenditures.

Target2: Annual increase in unit cost will be within 5% of the annual percent increase in overall library operating expenditures.

Separate Tallies: The unit costs for Acquisitions, Cataloging, and Interlibrary Services will be tallied and reported separately.

Result for Acquisitions FY2002: **Target1 achieved.**

6.2% increase in cost per transaction vs. 6.7% increase in overall operating expenditures.

Result for Cataloging FY2002: **Target1 achieved.**

11.9% decrease in cost per transaction vs. 6.7% increase in overall operating expenditures.

Result for Interlibrary Services FY2002: **Target 1 achieved.**

4.9% decrease in cost per transaction vs. 6.7% increase in overall operating expenditures.

METRIC XIX. UNIT COST OF PUBLIC SERVICE TRANSACTIONS.

Target1. Annual percent increase in unit cost to be equal to or less than annual percent increase in overall library operating budget.

Target2: Annual increase in unit cost will be within 5% of the annual percent increase in overall library operating budget.

Separate Tallies: The unit costs for circulation, instruction, and reference will be tallied and reported separately.

Result for FY2002: **Baselines established for circulation and reference.**

METRIC XX. DEVELOP INDIVIDUALIZED AND DEPARTMENTAL LEARNING PLANS.

Target1: 90% of library staff and departments have completed learning plans.

Target2: 80% of library staff and departments have completed learning plans.

Result for FY2002: **Target2 achieved.**

204 Learning plans for individuals out of 216 staff (94.4%)

18 Learning plans for departments out of 23 units (78.3%)

86.4% overall

METRIC XXI: RETENTION OF COMMENDED STAFF.

Target1: 95% of commended staff continue employment with the University Library.

Target2: 90% remain with the Library.

Result for FY2002: **Target1 achieved.**

90 of 93 commended classified staff (97%) remained; 44 of 45 commended faculty (98%) remained. Overall percentage 97%.

METRIC XXII. RELIABILITY OF EQUIPMENT.

Target1: Staff and user workstations (computers, scanners, order pickers, video, audio, microform, and copy equipment) shall function properly at least 95% of the time.

Target2: Equipment shall function properly least 90% of the time.

Result for FY2002: **Only 3 checks were done (91.4% of equipment was working). This is not enough data to report out.**

METRIC XXIII: RENOVATION OF MAJOR STAFF AND PUBLIC AREAS.

Target1: Three or more major renovations per year of which at least one is a staff area and one is a public area.

Target2: Two major renovations per year.

Result for FY2002: **Target1 achieved.**

So far this year, we have renovated the ILS Office in 415, the LTS Offices in 503A & B and completed construction of the Clemons Circulation Desk and the Clemons Wireless Classroom so we've met Target 1. Charles Frieden 2/25/02

METRIC XXIV. EXPENDITURES FOR DIGITAL MATERIALS.

Target1: Ensure that U.Va. is in the top quarter of all ARL libraries in our percentage of collections dollars expended on digital materials.

Target2: Ensure that U.Va. is in the top third of all ARL libraries in our percentage of collections dollars expended on digital materials.

Result for FY2002: **Failed to Meet Target1 or Target2.**

From ARL Supplementary Statistics FY2000

University of Virginia Libraries Expenditures for Electronic Materials	\$1,223,327
E-Materials as a % of Library Materials Budget	14.57%
Rank of %	39

Not in the top one third of the 105 respondents.

METRIC XXV. USABILITY TESTING OF WEBSITES.

Target1: At least 75% of all new and revised websites receive heuristic evaluation and at least 25% undergo full or discount usability testing.

Target2: At least 50% receive heuristic evaluation and at least 25% undergoing full or discount usability testing for the first year.

Result for FY2002: **Failed to Meet Target1 or Target2.**

14 websites added in FY02, 3 usability tested, 3 heuristics = 21% for each category.

METRIC XXVI. INCREASING THE QUALITY OF DIGITAL ACCESS.

Target1: 100% of identified priority content will be produced per DCRT (Digital Contents Review Team) standards within six months.

Target2: 90% of identified priority content produced per DCRT standards produced within six months.

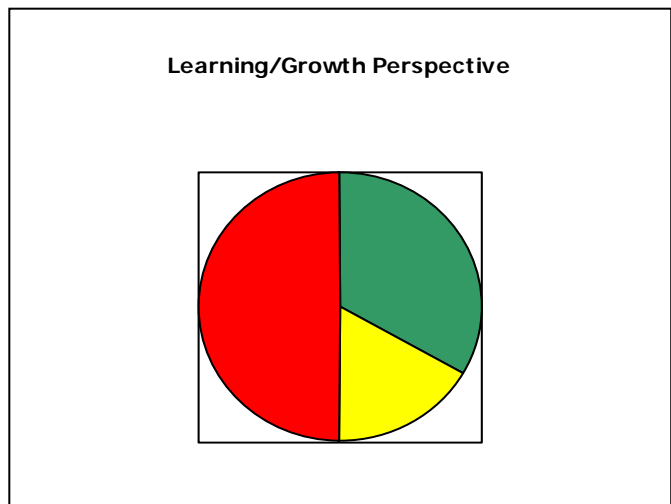
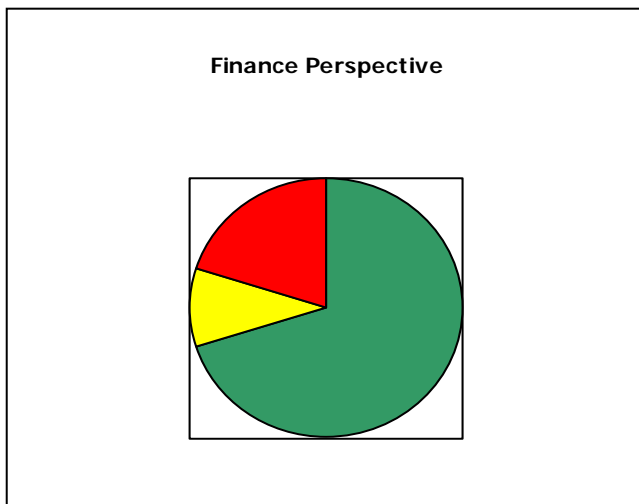
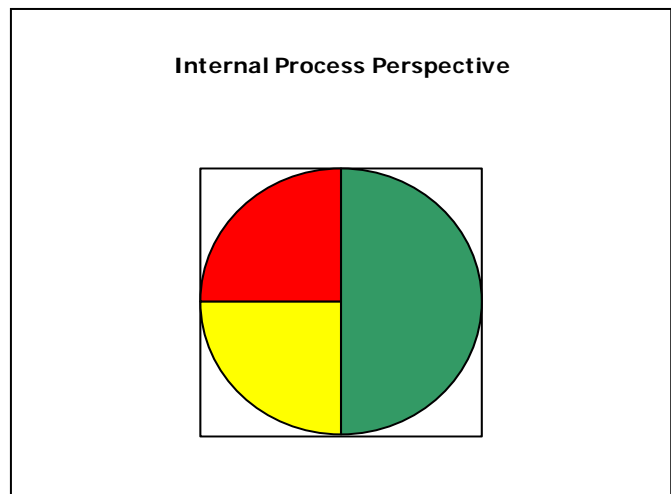
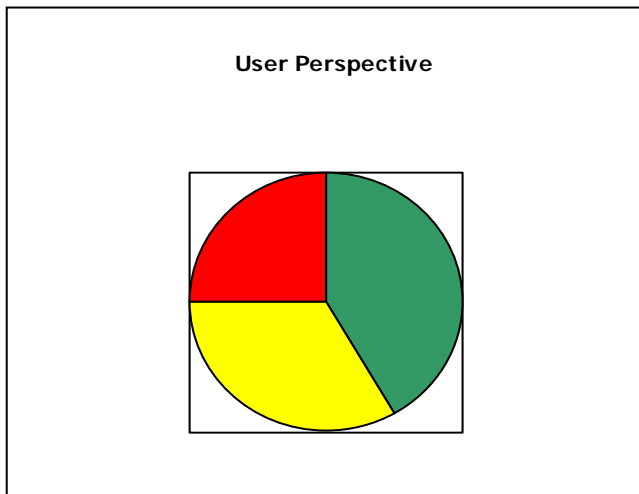
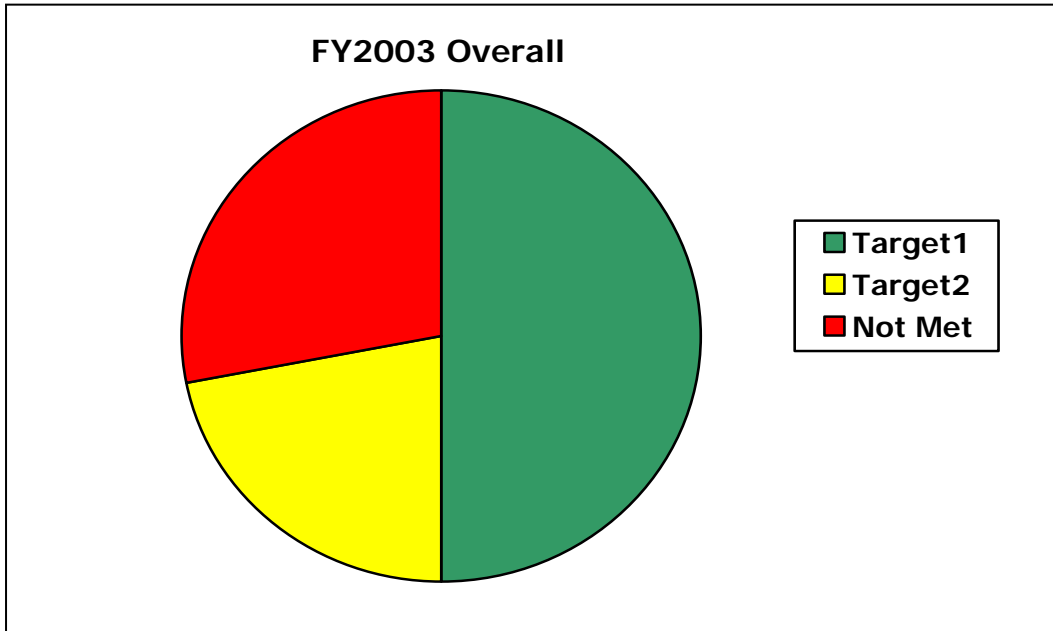
Result for FY2002: **Failed to Meet Target1 or Target2.**

13 projects were prioritized, 8 were completed for 61.5%. DLPS was operational for half the year.

Balanced Scorecard Summary FY2003

	Target 1 Met	Target 2 Met	Targets Not Met	Metrics Suspended	<i>Composite Score</i>
User Perspective	I: Overall survey: faculty I: Overall survey: students VI Circulation of new monographs:print VII: Turnaround time: searches VII: Turnaround time: ISS	II Customer service rating III ARL index ranking V Special Collections attendance VII: Turnaround time: LEO	VII: Turnaround time: ILL VII Turnaround time: recalls VII: Turnaround time: new books	IV Instruction rating VI Circulation of new monographs: electronic	
Subtotal	5	4	3	2	0.17
Internal Process	VIII Processing time for routine acquisitions XII Process Improvement	X Service to internal customers	IX Shelving time and quality	XI Departmental assessment plans	
Subtotal	2	1	1	1	0.25
Finance	XIII Non-State expenditures XIV Library expenditures/Univ expenditures XVI Unit cost of serial use: electronic XVII Unit cost of database use XVIII Unit cost of acquisitions XVIII Unit cost of ILS XXIX Unit cost of public services: circ	XV Used mono/total mono	XVIII Unit cost of cataloging XXIX Unit cost of public services: ref	XVI Unit cost of serial use: paper XXIX Unit cost of public services: user ed	
Subtotal	7	1	2	2	0.50
Learning/Growth	XXII Equipment reliability XXIII Renovations	XXI Retain commended staff	XXIV Expends for digital material XXV Website usability testing XXVI Increase digital access	XX Develop learning plans	
Subtotal	2	1	3	1	-0.17
Grand Total	16	7	9	6	0.22

**Balanced Scorecard
University of Virginia Library
FY2003 Results**



Balanced Scorecard Metric Results for FY2003

User Perspective

Metric I: Overall rating in student and faculty surveys.

Target1: Score of at least 4.0 (out of 5) from each of the major constituencies (undergraduates, graduates, humanities faculty, social sciences faculty, science faculty).

Target2: Score of at least 3.9 from each major constituency.

Separate tallies for faculty and students.

Result for FY2003: **Target1 achieved for faculty.**
Target1 achieved for students.

2000 Faculty survey—overall ratings

Science faculty 4.14

Humanities faculty 4.48

Social Sciences faculty 4.60

2001 Student survey—overall ratings of primary library

Undergraduates 4.19

Graduate students 4.11

Metric II: Customer service ratings in student and faculty surveys.

Target1: 4.25 mean from each of the major constituencies (undergraduates, graduates, humanities faculty, social sciences faculty, science faculty).

Target2: 4.00 or better from each major constituency.

Three variables combined into one metric

Result for FY2003: **Target2 achieved.**

2001 Student survey-combined customer service rating.

Undergraduates 4.18

Graduate students 4.29

Metric III. ARL index ranking.

Target1: The UVa Library should rank in the top 20.

Target2: The UVa Library should remain ranked in the top 25.

Result for FY2003: **Target2 achieved.**

Ranked 23 in the 2002 ARL Index.

Metric IV. Overall instruction rating in user education participant survey.

Target1: An overall rating of 4 on a scale of 1 to 5.

Target2: An overall rating of at least 3.8.

Result for FY2003: [Suspended for 2002/03]

Metric V. Attendance at Special Collections sessions.

Target1: Increase by 20% annually the number of informational, instructional, and outreach sessions and the number of persons attending sessions in Special Collections.

Target2: Increase by 10% the number of sessions and the number attending.

Result for FY2003: **Target2 achieved.**

	2001/02	2002/03	% Change
Sessions	197	223	13.2%
Participants	2,438	3,394	39.2%

Metric VI. Circulation of new monographs.

Target1: 60% of all newly cataloged monographs (excluding reference books and other non-circulating materials) should circulate to UVA patrons within two years of the time of cataloging. Newly acquired or newly digitized electronic monographs will be measured separately.

Target2: 50% of all new titles should circulate (or be used) within the first two years. Usage of newly acquired or newly digitized electronic monographs will be measured separately.

Result for FY2003: **Target1 achieved.**

Books purchased: 25,387

Books circulated: 15,585

Percent of new books that circulated: 61.4%

Metric VII. Turnaround time for processing and filling user requests.

Target1: Satisfy the turnaround targets 90% of the time.

Target2: Satisfy the turnaround targets 80% of the time.

Categories:

Searches: Notify patron of results of search within 4 days of request.

Recalls: Process requests within 1 day.

ILL: Fill requests in 7 days.

LEO: Fill requests in 7 days.

Toolkit: Fill requests by agreed upon date.

New Books: Fill requests in 7 days.

Separate tallies for each category.

Result for Searches: **Target1 achieved.**

Patrons were notified of search results within 4 days 91.3% of the time.

Result for Recalls: **Target not met.**

76.7% of recalls were processed within 1 day.

Result for ILL: **Target not met.**

64% of requests were filled in 7 days

Result for LEO: **Target2 achieved.**

89.5% of requests were filled in 7 days.

Result for Toolkit: **Target1 achieved.**

Sum02 = 99.5%

Fall02 = 99.1%

Sp03 = 92.4%

Weighted Average = 96.1%

Result for New Books: **Target not met.**

17% of new books requested by patrons were received in 7 days.

Internal Processes Perspective

Metric VIII. Processing time for routine acquisitions.

Target1: 90% of in-print books from North America will be processed within one month.

Target2: 80% of in-print books from North America will be processed within one month.

Result for FY2003: **Target1 achieved.**

Number processed within 1 month = 11,254

Total number processed = 12,311

Percent processed within 1 month = 91.4%

Metric IX. Turnaround time for reshelving/refiling

Target1: Accurately shelve/refile 85% of all materials by the end of the day following discharge regardless of where the item was discharged.

Target2: Accurately shelve/refile 75% of all materials by the end of the day following discharge regardless of where the item was discharged.

Result for FY2003: **Target not met.**

An average of 72.7% of items were shelved correctly by the end of the following day.

Metric X: Staff survey rating of internal service activities.

Target1: Composite rating of 4.0 of all internal service activities in annual staff survey, with no units rated below 3.5.

Target2: Composite rating of 3.5, with no units below 3.0.

Result for FY2003: **Target2 achieved.**

Composite rating of 3.99

Lowest unit rating of 3.54, highest of 4.33

109 responses received.

Metric XI. Percentage of departments with an assessment plan.

Target1: 100% participation.

Target2: 80% participation.

Result for FY2003: [Metric suspended for FY03]

Metric XII. Process improvement.

Target1: Complete at least one major process improvement each year.

Target2: Complete at least one major process improvement every two years.

Result for FY2003: **Target1 achieved.**

Improvement projects for FY03: Special Collections Public Service, and Reserve Processing.

Finance Perspective

Metric XIII. Non-state expenditures as a proportion of total university library expenditures.

Target1: The target for FY2002 was 10%. The target will increase by one half of one percent each year, i.e., the target for FY2003 will be 10.5%, for FY2004 it will be 11% etc.

Target2: The partial success indicator for FY2003 will be 10%.

Result for FY2003: **Target1 achieved.**

Total expenditures for FY03 = \$19,661,740
Expenditures from non-state sources = \$2,108,606 or 10.72%.

Metric XIV. Library budget as a proportion of the university expenditures.

Target1: The University Libraries should continue to account for at least 4% of the E&G (educational and general) share of University expenditures.

Target2: The University Libraries should account for at least 3.75% of E&G.

Result for FY2003: **Target1 achieved.**

University of Virginia E&G total expenditures for FY02: \$675M
University of Virginia Libraries expenditures for FY02: \$28.6M
Library budget proportion of total E&G: 4.24%

Metric XV. Expenditures for monographs that circulate as a proportion of all monographic expenditures.

Target1: Monographs that circulate within the first two years should account for at least 60% of the monographic budget.

Target2: The circulated items should account for at least 50% of the monographic budget.

Result for FY2003: **Target2 achieved.**

Total cost of books in sample: \$940,174.32
Cost of books that circulated: \$550,645.53
Circulated books = 58.6% of the total cost.

Metric XVI. Unit cost of serial use (paper and electronic)

Target1. 0% increase in unit cost each year.

Target2. Less than 5% increase in unit cost each year.

Separate Tallies: The numbers for print journals and electronic journals will be kept and reported separately.

[For FY03, measurement for paper serials was suspended.]

Result for FY2003: **Target1 achieved.**

Cost per journal article in FY02 was \$2.12.
Cost per journal article in FY03 was \$1.64.

Metric XVII. Unit cost of online databases.

Target1: 0% increase in unit cost each year.

Target2: Less than 5% increase in unit cost each year.

Result for FY2003: **Target1 achieved.**

Cost per search of online databases remained the same: \$0.52 for both FY02 and FY03.

Metric XVIII. Unit cost of processing library materials.

Target1. Annual percent change in unit cost will be equal to or less than annual percent change in overall library operating expenditures.

Target2: Annual percent change in unit cost will be within 5% of the annual percent change in overall library operating expenditures.

Separate Tallies: The unit costs for Acquisitions, Cataloging, and Interlibrary Services will be tallied and reported separately

Result for Acquisitions FY2003: **Target1 achieved.**

Cost per transaction FY02 = \$15.55
Cost per transaction FY03 = \$13.21

15.1% decrease in cost per transaction vs. 4.6% decrease in overall operating expenditures.

Result for Cataloging FY2003: **Target not met.**

Cost per transaction FY02 = \$14.11

Cost per transaction FY03 = \$16.35

15.9% increase in cost per transaction vs. 4.6% decrease in overall operating expenditures. There were no binding transactions for 9 months due to budget cuts.

Result for Interlibrary Services FY2003: **Target1 achieved.**

Cost per transaction FY02 = \$9.68

Cost per transaction FY03 = \$8.31

14.2% decrease in cost per transaction vs. 4.6% decrease in overall operating expenditures.

Metric XIX. Unit cost of public service transactions.

Target1. Annual percent change in unit cost to be equal to or less than annual percent change in overall library operating expenditures.

Target2: Annual percent change in unit cost will be within 5% of the annual percent change in overall library operating expenditures.

Separate Tallies: The unit costs for circulation, instruction, and reference will be tallied and reported separately.

Result for reference for FY2003: **Target not met.**

Cost per transaction FY02 = \$4.29

Cost per transaction FY03 = \$4.81

12% increase in reference costs vs. 4.6% decrease in operating expenditures.

Result for circulation for FY2003: **Target1 achieved.**

Cost per transaction FY02 = \$0.95

Cost per transaction FY03 = \$0.81

15.2% decrease in circulation costs vs. 4.6% decrease in operating expenditures. Hours were reduce in Fall 2002 due to budget cuts.

Result for user instruction for FY2003: [Suspended for FY03]

Learning and Growth Perspective

Metric XX. Develop individualized and departmental learning plans.

Target1: 90% of library staff and departments have completed learning plans.

Target2: 80% of library staff and departments have completed learning plans.

Result for FY2003: [Metric suspended for FY2002/03]

Metric XXI: Retention of commended staff.

Target1: 95% of commended employees remain on the staff.

Target2: 90% of commended employees remain on the staff.

Result for FY2003: **Target2 achieved.**

70 of 73 commended classified staff (96%) remained; 34 of 42 commended faculty (81%) remained.

Overall percentage 90.4%.

Metric XXII. Reliability of equipment.

Target1: Staff and user workstations (computers, scanners, order pickers, video, audio, microform, and copy equipment) shall function properly at least 95% of the time.

Target2: Equipment shall function properly least 90% of the time.

Result for FY2003: **Target1 achieved.**

The percent of equipment functioning properly is 95.2.

Metric XXIII: Renovation of major staff and public areas.

Target1: Three or more major renovations per year of which at least one is a staff area and one is a public area.

Target2: Two major renovations per year.

Result for FY2003: **Target1 achieved.**

The following projects were completed in 2002/03:

1. Completed Clemons 407 Classroom which included new carpeting, new tables and chairs, new blinds, new whiteboards and the installation of the classroom projector.
2. New carpeting and new modular offices and workstations for all staff located on the Clemons 4th floor.
3. New carpeting for the entire Fine Arts Library.
4. New carpeting in the Alderman Periodicals Room, the Alderman Electronic Classroom and IATH.
5. Installed two new Canon MS400 Micofilm Reader/Printers.

Metric XXIV. Expenditures for Digital Materials.

Target1: Ensure that U.Va. is in the top quarter of all ARL libraries in our percentage of collections dollars expended on digital materials.

Target2: Ensure that U.Va. is in the top third of all ARL libraries in our percentage of collections dollars expended on digital materials.

Result for FY2003: **Target not met.**

From ARL Supplementary Statistics FY2002:

University of Virginia Libraries Expenditures for Electronic Materials \$1,082,315

E-Materials as a % of Library Materials Budget 12.17%

Rank of % 98

Not in the top one third of the 110 respondents.

Metric XXV. Usability testing of websites.

Target1: At least 75% of all new and revised websites receive heuristic evaluation and at least 25% undergo full or discount usability testing.

Target2: At least 50% receive heuristic evaluation and at least 25% undergoing full or discount usability testing for the first year.

Result for FY2003: **Target not met.**

12 websites completed in FY03, 3 usability tested = 25.0%, 4 heuristics = 33.3%.

Metric XXVI. Increase the quality of digital access.

Target1: 100% of identified priority content will be produced per DCRT (Digital Contents Review Team) standards.

Target2: 90% of identified priority content produced per DCRT standards.

Result for FY2003: **Target not met.**

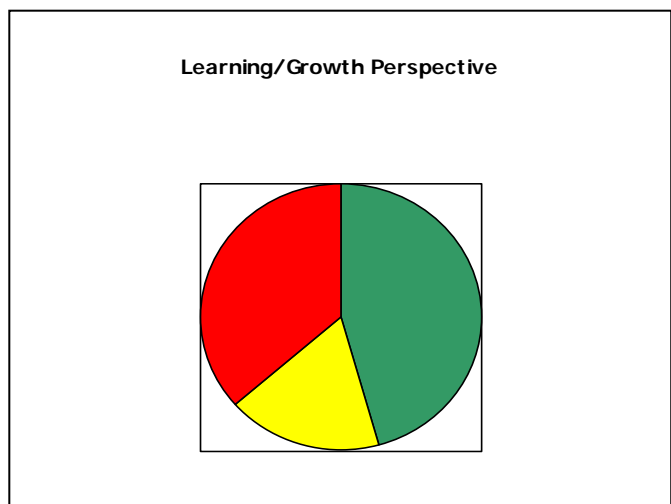
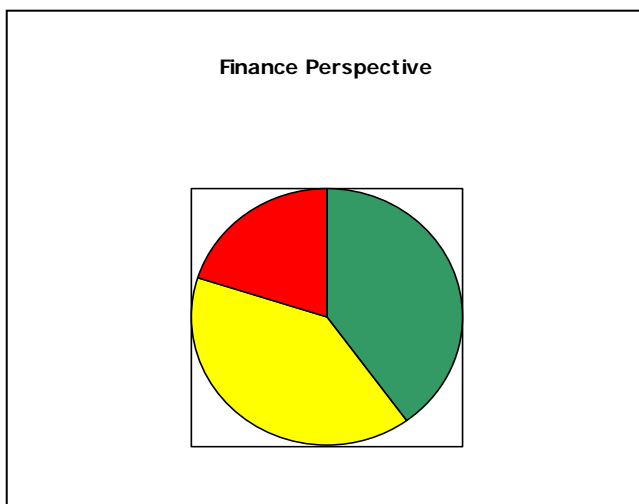
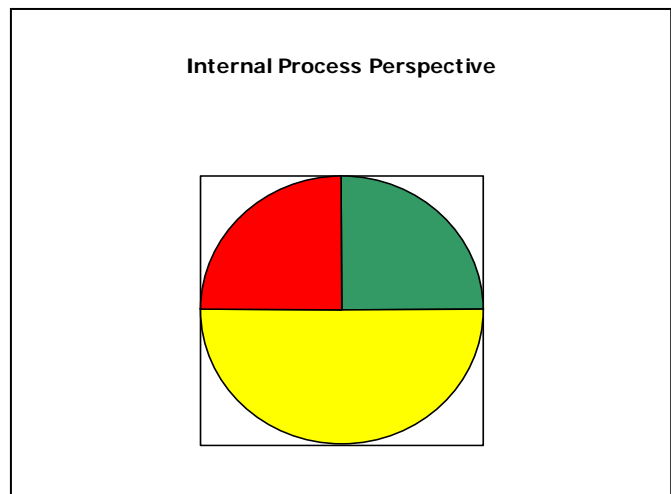
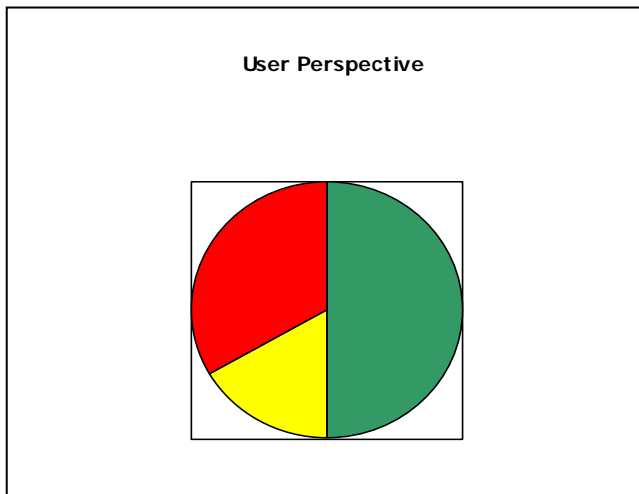
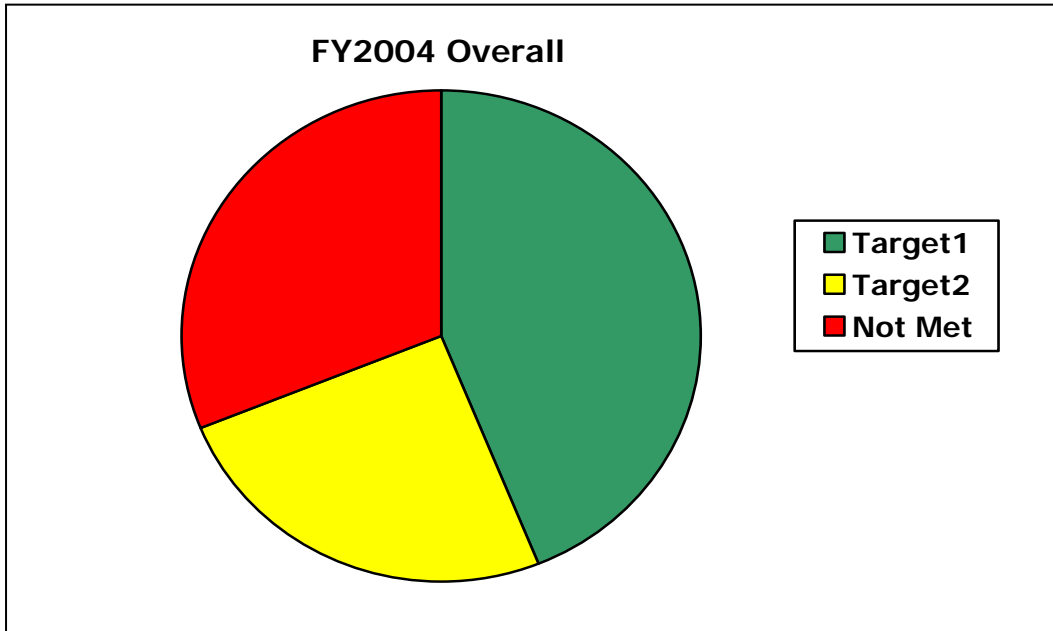
3 projects were prioritized, 2 were completed for 66.6%.

Balanced Scorecard Summary FY2004

	Target 1 Met	Target 2 Met	Targets Not Met	Metrics Suspended	<i>Composite Score</i>
User Perspective	U.1.a Overall Survey Rating: Faculty U.1.b Customer Service Rating; Faculty U.3.a Circulation of New Monographs: Print U.4.a Request Turnaround: Searches U.4.a Request Turnaround: ISS U.4.a Request Turnaround: LEO	U.1.c ARL Ranking U.2.a Instruction Ratings	U.2.b Use of Special Collections Materials U.4.a Request Turnaround: ILL U.4.a Request Turnaround: New Books U.4.b Reduce Number of Recalls	U.3.a Circulation of New Monographs: Electronic	<i>0.17</i>
Subtotal	6	2	4	1	<i>0.17</i>
Internal Process	I.3.a Process Improvement	I.1.a Processing Time/Routine Acquisitions I.1.b Shelving Time & Accuracy	I.2.b Internal Communication Rating	I.2.a Service to Internal Customers	<i>0.00</i>
Subtotal	1	2	1	1	<i>0.00</i>
Finance	F.1.c Unrestricted Development Rcpts F.2.a Unit Cost of Electronic Serial Use	F.1.a Non-State Expenditures F.1.b Library Expenditures/University Expenditures	F.2.b Unit Cost of Database Use	F.2.c Unit Cost of Processing: Acq F.2.c Unit Cost of Processing: Cat F.2.c Unit Cost of Processing: DLPS F.2.d Unit Cost of Public Service: Circ F.2.d Unit Cost of Public Service: Ref	<i>0.20</i>
Subtotal	2	2	1	5	<i>0.20</i>
Learning/Growth	L.1.b Diversity of Staff L.3.a Equipment Reliability L.3.b Renovations L.4.b Website Usability Testing L.4.c Increase Digital Access	L.2.b Retention of Commended Staff L.2.c Compare Staff Salaries	L.1.a Impact of Training L.2.a Job Satisfaction L.4.a Expenditures for Digital Materials L.5.a Culture of Assessment		<i>0.09</i>
Subtotal	5	2	4	0	<i>0.09</i>
Grand Total	14	8	10	7	<i>0.13</i>

URL: <http://www.lib.virginia.edu/bsc/>

**Balanced Scorecard
University of Virginia Library
FY2004 Results**



BALANCED SCORECARD RESULTS 2003/2004

USER PERSPECTIVE

METRIC U.1.A. OVERALL RATING IN STUDENT AND FACULTY SURVEYS.

Target1: We should attain a score of at least 4.00 (out of 5.00) from each of the major constituencies: undergraduates, graduates, humanities faculty, social science faculty, science faculty.

Target2: Score of at least 3.90 from each of the major constituencies.

Separate Tallies: The ratings for faculty and students will be kept and reported separately.

Result for FY2004: **Target1 achieved for faculty.**
Student survey is out-of-date.

2004 Faculty survey—overall rating:

Humanities = 4.41

Sciences = 4.25

Social Sciences = 4.42

METRIC U.1.B. CUSTOMER SERVICE RATING IN STUDENT AND FACULTY SURVEYS.

Target1: Customer services should receive a score of at least 4.25 (out of 5.00) from each of the major constituencies: undergraduates, graduates, humanities faculty, social science faculty, science faculty.

Target2: Score of at least 4.00 from each of the major constituencies.

Result for FY2004: **Target1 achieved for faculty.**
Student survey is out-of-date.

2004 faculty survey: Humanities: 4.70

Sciences: 4.51

Social Sciences: 4.61

METRIC U.1.C. ARL INDEX RANKING.

Target1: The UVa Library should rank in the top 20.

Target2: The UVa Library should remain ranked in the top 25.

Result for FY2004: **Target2 achieved.**
UVa Library is ranked 25th in the 2003 ARL Index.

METRIC U.2.A. OVERALL INSTRUCTION RATING IN USER EDUCATION PARTICIPANT SURVEY.

Target1: An overall rating of 4.00 on a scale of 1 to 5.

Target2: An overall rating of at least 3.80.

Result for FY2004: **Target2 achieved.**
3.94 overall score
4.04 for upper level instruction
3.73 for 1st year instruction

METRIC U.2.B. USE OF SPECIAL COLLECTIONS MATERIALS.

Target1: Increase by 10% annually the number of materials used or circulated in Special Collections.

Target2: Increase by 5% the number of materials used or circulated.

Result for FY2004: **Targets not met.**
Collection use for FY03 = 14,634
Collection use for FY04 = 11,252
Use decreased by 23.1%

METRIC U.3.A. CIRCULATION OF NEW MONOGRAPHS.

Target1: 60% of all newly cataloged monographs (excluding reference books and other non-circulating materials) should circulate within two years of the time of cataloging. Usage of newly acquired or newly digitized electronic monographs will be measured separately.

Target2: 50% of all new titles should circulate within the first two years. Usage of newly acquired or newly digitized electronic monographs will be measured separately.

Separate Tallies: The numbers for print material and digital materials will be kept and reported separately.

Result for FY2004: **Target1 achieved.**

Books in sample: 26,807

Books circulated: 16,639

% circulated: 62.1%

Measure for digital materials was suspended for FY2004.

METRIC U.4.A. TURNAROUND TIME FOR PROCESSING AND FILLING USER REQUESTS.

Target1: Satisfy the turnaround targets 90% of the time.

Target2: Satisfy the turnaround targets 80% of the time.

Categories:

Searches: Notify patron of results of search within 4 days of request.

ILL: Fill requests in 7 days.

LEO: Fill requests in 7 days.

ISS: Fill requests by agreed upon date.

New Books: Fill requests in 7 days.

Result for FY2004-Searches: **Target1 achieved.**

For 89.6% of items requested, patrons were notified in 4 days.

Result for FY2004-ILL: **Targets not met.**

74% of ILL requests were filled within 7 days.

Result for FY2004-LEO: **Target1 achieved.**

96.8% of LEO requests were filled in 7 days.

Result for FY2004-ISS: **Target1 achieved.**

Sum03 = 99.12%

Fall03 =98.75%

Sp04 =96.98%

Average = 98.28% of requests were filled by agreed upon date.

Result for FY2004-New Books: **Targets not met.**

34% of new books requested by patrons were received in 7 days.

METRIC U.4.B. REDUCE THE NUMBER OF RECALLS PLACED EACH YEAR.

Target1: Reduce the number of recalls by 5%.

Target2: Reduce the number of recalls by 0%.

Result for FY2004: **Targets not met.**

FY03 = 43,272 recalls

FY04 = 46,708 recalls

Recalls increased by 6.1%.

INTERNAL PROCESS PERSPECTIVE

METRIC I.1.A. PROCESSING TIME FOR ROUTINE ACQUISITIONS.

Target1: 90% of in-print books from North America will be processed within one month.

Target2: 80% of in-print books from North America will be processed within one month.

Result for FY2004: **Target2 achieved.**

Total processed = 11,053

Processed within 1 month = 9,880

Percent processed within 1 month = 89.3%

METRIC I.1.B. TURNAROUND TIME FOR RESHELVING/REFILING.

Target1: Accurately shelve/refile 85% of all materials by the end of the day following discharge regardless of where the item was discharged.

Target2: Accurately shelve/refile 75% of all materials by the end of the day following discharge regardless of where the item was discharged.

Result for FY2004: **Target2 achieved.**

Items shelved correctly within one day = 81.1%.

METRIC I.2.A. STAFF SURVEY RATING OF INTERNAL SERVICE ACTIVITIES.

Target1: Composite rating of 4.00 of all internal service activities in annual staff survey, with no units rated below 3.50.

Target2: Composite rating of 3.50, with no units below 3.00.

Result for FY2004: **Suspended for FY2004.**

METRIC I.2.B. INTERNAL COMMUNICATIONS RATING.

Target1: A score of 4.00 on internal communications in the annual staff work life survey, with no rating below 3.50 for a single question.

Target2: A score of 3.75, with no rating below 3.25 for a single question.

Result for FY2004: **Targets not met.**

Score = 3.11, with 40% agreeing or agreeing strongly with communications statements. In the future, we will use the percentage agreeing rather than the rating score for this metric.

METRIC I.3.A. PROCESS IMPROVEMENT.

Target1: Complete at least one major process improvement each year.

Target2: Complete at least one major process improvement every two years.

Result for FY2004: **Target1 achieved.**

Improvement project for FY04: Special Collections looked at its acquisitions and cataloging processes as well as its organizational structure.

FINANCE PERSPECTIVE

METRIC F.1.A. NON-STATE EXPENDITURES AS A PROPORTION OF TOTAL UNIVERSITY LIBRARY EXPENDITURES.

Target1: The target for FY2002, our initial year for Balanced Scorecard, was 10.0%. The target will increase by one half of one percent each following year, i.e., the target for FY2003 will be 10.5%, for FY2004 it will be 11.0% etc.

Target2: The partial success indicator for each following year is .5% less than the Target1 indicator.

Result for FY2004: **Target2 achieved.**

Total expenditures for FY04 = \$21,700,316

Expenditures from non-state sources = \$2,272,785 or 10.5%.

METRIC F.1.B. LIBRARY EXPENDITURES AS A PROPORTION OF UNIVERSITY EXPENDITURES.

Target1: The University Libraries should continue to account for at least 4.00% of the E&G (educational and general) share of University expenditures.

Target2: The University Libraries should account for at least 3.75% of E&G.

Result for FY2004: **Target2 achieved.**

University of Virginia E&G total expenditures for FY03: \$715M

University of Virginia Libraries expenditures for FY03: \$26,867,504.
Library budget proportion of total E&G: 3.76%

Note: The University has been required to adopt a new financial accounting reporting system (GASB 34/35) that does not report an explicit E&G total. The \$715M figure is an estimate, derived from the GASB report (Total Operating Expenditures less Depreciation and Auxiliary Enterprises). For future years we may want to adjust this metric and use the GASB model directly.

METRIC F.1.C. AMOUNT OF DEVELOPMENT RECEIPTS THAT ARE UNRESTRICTED.

Target1: Using FY2001 as a baseline, increase unrestricted (or minimally restricted) giving by 10%.

Target2: Using FY2001 as a baseline, increase unrestricted (or minimally restricted) giving by 5%.

Result for FY2004: **Target1 achieved.**

Unrestricted donations total of \$354,000 (all from annual giving).

Note: Includes any funds donated (endowment, annual giving, planned gifts, etc.) for which the library may make the decision for its use and which could be used to replace state funds if needed. The baseline of FY 2000/01 was \$232,000, meaning that Target1 for FY04 was \$309,000, and Target2 was \$269,000.

METRIC F.2.A. UNIT COST OF ELECTRONIC SERIAL USE.

Target1. 0% increase in cost per use each year.

Target2. Less than 5% increase in cost per use each year.

Result for FY2004: **Target1 achieved.**

Cost is \$1.64 per article used; FY03 cost was \$1.64 per article used.

Note: This calculation included resources funded by VIVA as well as those funded directly by UVa. In FY05 we should use only UVa expenditures for this metric. The FY04 unit cost per search for UVa funded databases was \$2.34. This will be our baseline in determining if we meet our target in FY05.

METRIC F.2.B. UNIT COST OF ONLINE DATABASES.

Target1: 0% increase in unit cost each year.

Target2: Less than 5% increase in unit cost each year.

Result for FY2004: **Targets not met.**

Cost is \$0.59 per search for FY04 and for FY03 was \$0.52 per search, a 12% increase.

Note: This calculation included databases funded by VIVA as well as those funded directly by UVa. In FY05 we should use only UVa expenditures for this metric. The FY04 unit cost per search for UVa funded databases was \$1.05. This will be our baseline in determining if we meet our target in FY05.

METRIC F.2.C. UNIT COST OF PROCESSING LIBRARY MATERIALS.

Target1. Annual percent change in unit cost will be equal to or less than annual percent change in overall library operating expenditures.

Target2: Annual percent change in unit cost will be within 5% of the annual percent change in overall library operating expenditures.

Separate Tallies: The unit costs for Acquisitions, Cataloging (including Preservation), and Digital Library Production Services will be tallied and reported separately.

Result for FY2004: **Suspended for FY2004.**

METRIC F.2.D. UNIT COST OF PUBLIC SERVICE TRANSACTIONS.

Target1. Annual percent change in unit cost will be equal to or less than annual percent change in overall library operating expenditures.

Target2: Annual change in unit cost will be within 5% of the annual percent change in overall library operating expenditures.

Separate Tallies: The unit costs for ILS (including Instructional Scanning Services), circulation, and reference will be tallied and reported separately.

Result for FY2004: **Suspended for FY204.**

LEARNING/GROWTH PERSPECTIVE

METRIC L.1.A. IMPACT OF TRAINING.

Target1: A rating of 4.00 for overall satisfaction with training activities in the annual work-life quality survey, with no individual training measures below 3.50.

Target2: Overall rating of 3.75, with no measures below 3.25.

Result for FY2004: **Targets not met.**

Score = 3.52, with 55% agreeing or agreeing strongly with training statements. In the future, we will use the percentage agreeing rather than the rating score for this metric.

METRIC L.1.B. DIVERSITY OF STAFF.

Target1: A net increase of at least 4 in faculty/staff diversity, with a net increase of at least 2 in faculty diversity.

Target2: A net increase of at least 2 in faculty/staff diversity, with a net increase of at least 1 in faculty diversity.

Result for FY2004: **Target1 achieved.**

2 diverse faculty hired, none lost

4 diverse classified hired, one lost

Net increase of 5 with 2 in faculty

METRIC L.2.A. JOB SATISFACTION AMONG LIBRARY EMPLOYEES.

Target1: A score of 4.25 for overall job satisfaction in annual staff work-life survey, with no rating below 3.50 for a single question.

Target2: A score of 3.75, with no rating below 3.25 for a single question.

Result for FY2004: **Targets not met.**

Score = 3.60, with 60% agreeing or agreeing strongly with job satisfaction statements. In the future, we will use the percentage agreeing rather than the rating score for this metric.

METRIC L.2.B. RETENTION RATE OF COMMENDED EMPLOYEES.

Target1: 95% of commended employees remain on the staff.

Target2: 90% of commended employees remain on the staff.

Result for FY2004: **Target2 achieved.**

Classified staff: 64 commended, 62 retained = 97%

Faculty: 40 commended, 36 retained = 90%

94.2% overall

METRIC L.2.C. COMPARE STAFF SALARIES (FACULTY AND CLASSIFIED) TO PEER GROUPS.

Target 1 Library faculty salary rating in the upper 40% of all ARL institutions and 60% of classified employees above the mean salary for similar jobs in the State of Virginia.

Target2: Library faculty salary rating in the upper 50% of all ARL institutions and 50% of classified employees above the mean salary for similar jobs in the State of Virginia.

Result for FY2004: **Target2 achieved.**

Faculty ranked 50 among 114 ARL institutions = upper 44%.

Salary data for positions comparable to classified staff positions in Virginia is incomplete and unreliable.

METRIC L.3.A. RELIABILITY OF EQUIPMENT.

Target1: Staff and user workstations (computers, scanners, video, audio, microform, and copy equipment, etc.) shall function properly at least 95% of the time.

Target2: Equipment shall function properly least 90% of the time.

Result for FY2004: **Target1 achieved.**

The percent of equipment functioning properly was 96.6%.

METRIC L.3.B. RENOVATION OF MAJOR STAFF AND PUBLIC AREAS.

Target1: Three or more major renovations per year of which at least one is a staff area and one is a public area.

Target2: Two major renovations per year of either staff or public areas.

Result for FY2004: **Target1 achieved.**

The following projects were completed in FY2003/04:

1. Clemons was recarpeted.
2. Clemons reserves room was built.
3. Alderman circulation desk was renovated and combined.
4. Workstation furniture was acquired for Associate University Librarian, Music Library offices, and Acting Director of Cataloging.

METRIC L.4.A. EXPENDITURES FOR DIGITAL MATERIALS.

Target1: UVa should be in the top quarter of all ARL libraries in our percentage of collections dollars expended on digital materials.

Target2: UVa should be in the top third of all ARL libraries in our percentage of collections dollars expended on digital materials.

Result for FY2004: **Targets not met.**

For FY2003, UVa ranked 44 out of 111 or in the top 40%.

METRIC L.4.B. USABILITY TESTING OF LIBRARY WEBSITES.

Target1: At least 75% of all websites under development or review should receive heuristic evaluation and at least 50% of all such sites should receive usability testing.

Target2: At least 50% of all websites under development or review should receive heuristic evaluation and at least 25% of all such sites should receive usability testing.

Result for FY2004: **Target1 achieved.**

10 websites were under development in FY2004.

7 usability tested + 2 heuristics = 90%

Note: The original intent of this metric was to measure whether websites under revision receive either heuristic OR usability testing, not both. The metric is being revised accordingly for FY05. We are measuring according to that standard for FY04 as well.

METRIC L.4.C. INCREASING THE QUALITY OF DIGITAL ACCESS.

Target1: 100% of identified priority content will be produced per DCRT (Digital Contents Review Team) standards.

Target2: 90% of identified priority content will be produced per DCRT standards.

Result for FY2004: **Target1 achieved.**

3 of 3 projects planned were completed for 100%.

METRIC L.5.A. DEVELOP A CULTURE OF ASSESSMENT WITHIN THE LIBRARY.

Target1: 75% of respondents score 12 or more affirmative responses on the ARL Culture of Assessment IQ.

Target2: 50% of respondents score 12 or more affirmative responses on the ARL Culture of Assessment IQ.

Result for FY2004: **Targets not met.**

30.4% of library managers scored 12 statements "true" on the ARL Culture of Assessment IQ instrument.

Balanced Scorecard Data Collection FY2005

Metric Number	Metric	Result	Data
<i>User Perspective</i>			
U.1.a	Overall survey rating: faculty	1	2004 Faculty survey—overall rating: Humanities = 4.41 Sci = 4.25 SocSci = 4.42
U.1.a	Overall survey rating: student	1	2005 Student Survey--overall rating: Grads = 4.08 Undergrads = 4.13
U.1.b	Customer service rating	2	2004 faculty survey: Humanities = 4.70 Sciences = 4.51 Social Sciences = 4.61 2005 Student survey: Grads=4.37 Undergrads = 4.15
U.2.a	Instruction ratings	1	4.35 overall score
U.3.a	Circulation of new print monographs	2	Bks in sample: 23,602 Bks circulated: 13,984 % circulated: 59.2%
U.3.b	Use of Special Collections materials	1	Collection use for FY04 = 11,252, Collection use for FY05 = 12,761. Use increased by 13.4%
U.4	Turnaround time for user requests:		
U.4.a	Searches	X	94.2% notified within 4 days; 79.1% searched on first day.
U.4.a	Turnaround time: LEO	1	96.0% of requests were filled in 7 days.
U.4.b	Turnaround time: ILL Borrowing	2	67.0% of requests were filled in 7 days
U.4.b	Turnaround time: ISS	1	Sum04 = 99.06% Fall04 =99.62% Sp05 =99.29% Average = 99.32%
U.4.b	Turnaround time: New books	2	62% of new books requested by patrons were received in 7 days.
U.4.c	Reduce # of recalls	2	FY04 = 46,708 recalls FY05 = 44,527 recalls Recalls decreased by 4.7%.
<i>Internal Process Perspective</i>			
I.1.a	Processing time for routine acquisitions	2	Processed w/in 1 month = 10,110 Total processed = 11,559 Percent processed w/in 1 month = 87.5%
I.1.b	Shelving time and quality	2	Items shelved correctly = 75.4%
I.2.a	Internal communication rating	no score	Survey not fielded in FY05
I.2.b	Website usability testing	2	4 of 6 websites under development in FY05 for 66.6%
I.3.a	Process improvement	1	Improvement projects for FY05: Faculty search process, classified staff search process, DLPS workflow
I.3.b	Service to internal customers	1	Composite score 4.09 Lowest unit score 3.52, highest 4.57.
I.4.a	Equipment reliability	no score	FY05 = xx%
I.4.b	Renovations	1	The following projects were completed in 2004/05: Refurbished Alderman 223, 223A, 217, 219, 221, 225, 227; refurbished 201 & moved HR, DLPS, FS into 201; refurbished Alderman 215, 215a; refurbished McGregor Room as reading room
I.4.c	Reliability of servers	1	9 Unix servers were "up" 98.66% of the time between 3/29/05 and 6/30/05.

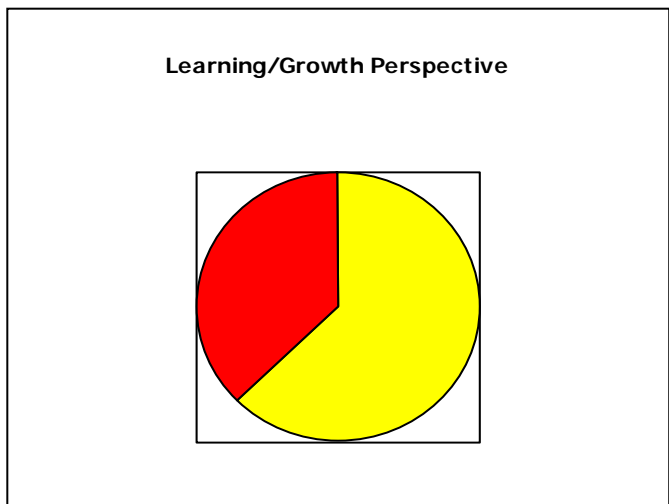
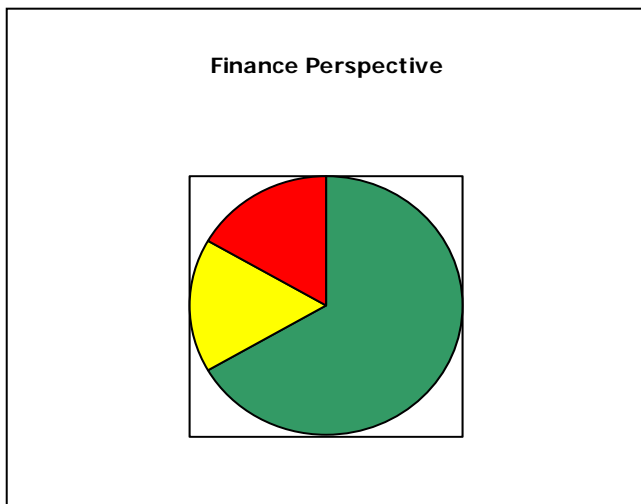
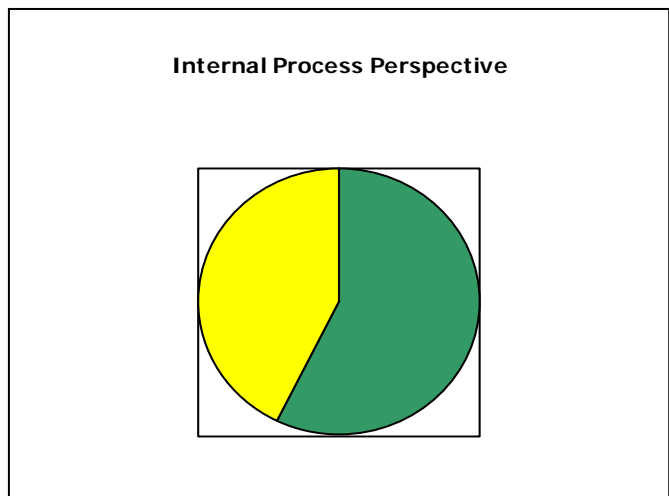
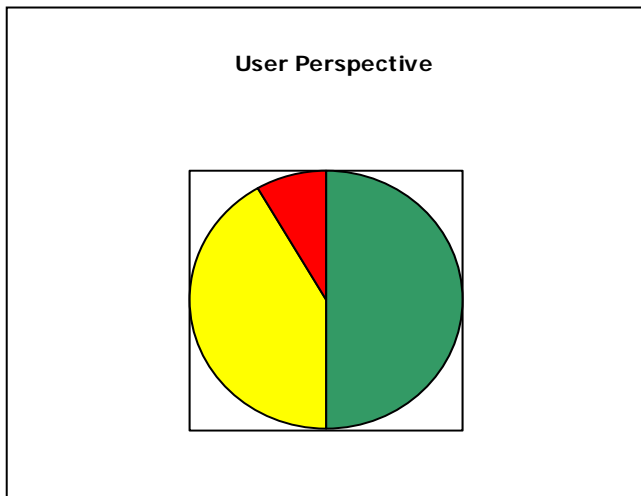
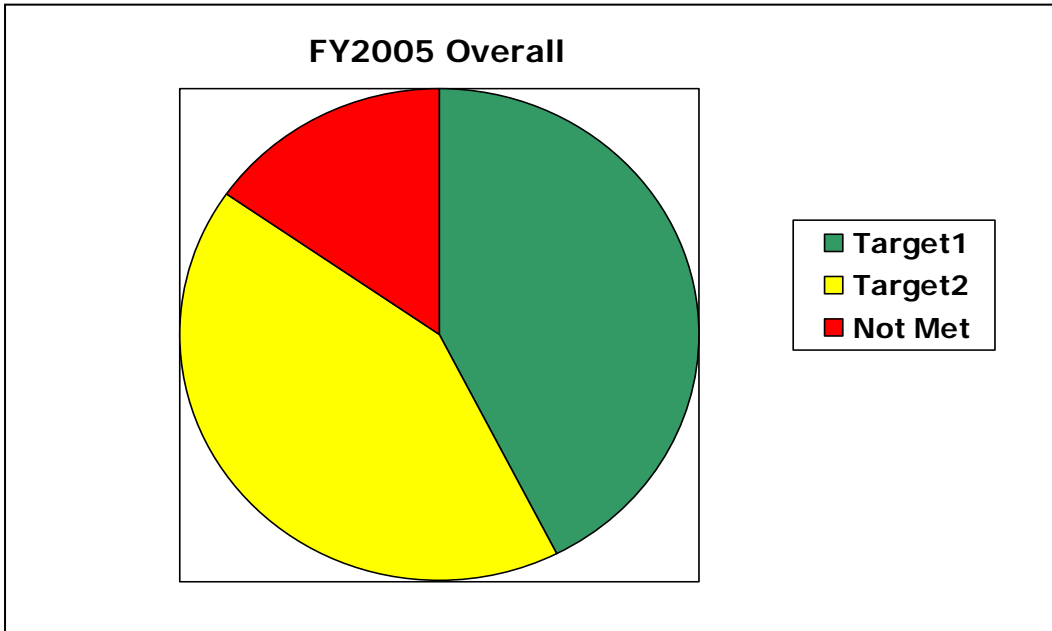
Balanced Scorecard Data Collection FY2005

Metric Number	Metric	Result	Data
	<i>Finance Perspective</i>		
F.1.a	Non-institutional expenditures	X	Total expenditures for FY05 = \$\$25,019,598. Expenditures from non-state sources = \$2,421,324 or 9.7%.
F.1.b	Library expends/University expends	2	Libraries expended FY04: \$29,354,993 University E&G FY04: \$749M 3.92% for FY04
F.1.c	Unrestricted gifts	1	Baseline = \$232,000 FY05 target1 = \$340,000. FY05 receipts = \$752,560
F.2.a	Unit cost e-serial use	1	Cost per journal article (funded by UVA) in FY04 was \$2.34. Cost per journal article in FY05 was \$1.93.
F.2.b	Unit cost of database use	1	FY05 Cost is \$0.97 per search; cost in FY04 of UVA funded databases was \$1.05.
F.2.d	Unit cost ILL transactions	1	ILS cost/transaction = \$10.40, up 6.6%; overall lib budget = \$25,019,598, up 15.2%
	<i>Learning Perspective</i>		
L.1.a	Impact of training	no score	survey not fielded in FY05
L.2.a	Job satisfaction	no score	survey not fielded in FY05
L.2.b	Retention of staff	2	Classified staff: 144 out of 157 retained: 92% Faculty: 73 out of 75 retained: 97%. 94% overall
L.2.c	Compare staff salaries	2	Faculty ranked 47 among 113 ARL institutions = upper 41.6%. Data for classified staff salaries is incomplete and unreliable.
L.2.d	Diversity of staff	X	0 diverse faculty hired, 2 lost. 6 diverse classified hired, 0 lost. Net increase of 6 with 0 in faculty
L.3.a	Expends for electronic materials	X	FY2004 ranked 57 out of 111 or in the top 51%.
L.3.b	ARL Index Ranking	2	Ranked 24 in the 2004 ARL Index.
L.3.c	Funding generated by R&D	X	For FY03-FY05, total income = \$1,158,101; total expenses = \$1,647,278.51. Grant income covers 70% of expenses.
L.3.d	Development of central repository	2	Objects as of 7/2004 = 42,310; objects as of 7/2005 = 48,151; increase of 13.8%
L.3.e	Implementation of Planning Process initiatives	no score	This metric will not be tallied until the FY06 report as the planning process is now on a 2, rather than 1, year cycle.
L.4.a	Culture of assessment	2	50.0% scored 12 or more statements "true" on the ARL Culture of Assessment IQ.

University of Virginia Library Balanced Scorecard Summary FY2005

	Target 1 Met	Target 2 Met	Targets Not Met	Metrics Suspended	<i>Composite Score</i>
User Perspective	U1a. Overall survey rating: faculty U1a. Overall survey rating: students U2a User instruction ratings U3b. Use of Special Collections materials U4a. Turnaround time: LEO U4b. Turnaround time: ISS	U1b. Customer service rating U3a. Circulation of new monographs U4b. Turnaround time: new books U4b. Turnaround time: ILL U4c. Reduce number of recalls	U4a. User search requests		
Subtotal	6	5	1	0	0.42
Internal Process	I3a. Process improvement I3b. Service to internal customers I4b. Renovations I4c. Reliability of servers	I1a. Processing time: routine acquisitions I1b. Shelving time & quality I2b. Website usability testing		I2a. Internal communication rating I4a. Equipment reliability	
Subtotal	4	3	0	2	0.57
Finance	F1c. Minimally restricted receipts F2a. Unit cost e-serial use F2b. Unit cost of database use F2d. Unit cost of ILS transactions	F1b. Library expends/University expends	F1a. Non-institutional expenditures		
Subtotal	4	1	1	0	0.50
Learning/Growth		L2b. Retention of staff L2c. Compare staff salaries: faculty L3b. ARL index ranking L3d. Development of central repository L4a. Culture of assessment	L2d. Diversity of staff L3a. Expends for electronic materials L3c. Grant funding of R & D	L1a. Impact of training L2a. Job satisfaction L3e. Implement planning initiatives	
Subtotal	0	5	3	3	-0.38
Grand Total	14	14	5	5	0.27

**Balanced Scorecard
University of Virginia Library
FY2005 Results**



BALANCED SCORECARD RESULTS 2004/2005

USER PERSPECTIVE

METRIC U.1.A. OVERALL RATING IN STUDENT AND FACULTY SURVEYS.

Target1: A score of at least 4.00 (out of 5.00) from each of the major constituencies: undergraduate students, graduate students, humanities faculty, social science faculty, science faculty.

Target2: A score of at least 3.90 from each of the major constituencies.

Separate Tallies: The ratings from faculty and students will be kept and reported separately.

Result for FY2005: **Target1 achieved for faculty.**

Target1 achieved for students.

2004 Faculty survey—overall rating:	2005 student survey	
Humanities = 4.41	Graduates	4.08
Sciences = 4.25	Undergraduates	4.13
Social Sciences = 4.42		

METRIC U.1.B. CUSTOMER SERVICE RATING IN STUDENT AND FACULTY SURVEYS.

Target1: A score of at least 4.25 (out of 5.00) from each of the major constituencies: undergraduate students, graduate students, humanities faculty, social science faculty, science faculty.

Target2: A score of at least 4.00 from each of the major constituencies.

Result for FY2005: **Target2 achieved.**

2004 faculty survey:	2005 student survey:
Humanities: 4.70	Grads: 4.08
Sciences: 4.51	Undergrads 4.15
Social Sciences: 4.61	

METRIC U.2.A. OVERALL INSTRUCTION RATING IN USER EDUCATION PARTICIPANT SURVEY.

Target1: An overall rating of 4.00 on a scale of 1 to 5.

Target2: An overall rating of at least 3.80.

Result for FY2005: **Target1 achieved.**

overall score: 4.35

METRIC U.3.A. CIRCULATION OF NEW MONOGRAPHS.

Target1: 60% of all newly cataloged monographs (excluding reference books and other non-circulating materials) should circulate within two years of the time of cataloging.

Target2: 50% of all new titles should circulate within the first two years.

Result for FY2005: **Target2 achieved.**

Books in sample: 23,602
Books circulated: 13,984
% circulated: 59.2%

METRIC U.3.B. USE OF SPECIAL COLLECTIONS MATERIALS.

Target1: Increase by 10% annually the number of materials used or circulated in Special Collections.

Target2: Increase by 5% the number of materials used or circulated.

Result for FY2005: **Target1 achieved.**

Collection use for FY04 = 11,252
Collection use for FY05 = 12,761
Use increased by 13.4%

METRIC U.4.A. TURNAROUND TIME FOR SEARCHES, LEO, AND INSTRUCTIONAL SCANNING (LOCAL RESOURCES).

Target1: Satisfy the turnaround targets 90% of the time.

Target2: Satisfy the turnaround targets 80% of the time.

Searches: Search for requested item within 1 day and notify patron of results within 4 days of request.

Result for FY2005-Searches: **Targets not met.**

For 94.2% of items requested, patrons were notified in 4 days; 79.1% were searched on the first day.

LEO: Fill requests in 7 days

Result for FY2005-LEO: **Target1 achieved.**

96.0% of LEO requests were filled in 7 days.

Instructional Scanning: Fill requests by agreed upon date.

Result for FY2005-ISS: **Target1 achieved.**

Sum04 = 99.06%

Fall04 = 99.62%

Sp05 = 99.29%

Average = 99.32% of requests were filled by agreed upon date.

METRIC U.4.B. TURNAROUND TIME FOR NEW BOOK AND ILL REQUESTS (EXTERNAL RESOURCES).

Target1: Satisfy the turnaround targets 75% of the time.

Target2: Satisfy the turnaround targets 50% of the time.

Result for FY2005-ILL: **Target2 achieved.**

67.0% of ILL requests were filled within 7 days.

Result for FY2005-New Books: **Target2 achieved.**

62% of new books requested by patrons were received in 7 days.

METRIC U.4.C. REDUCE THE NUMBER OF RECALLS PLACED EACH YEAR.

Target1: Reduce the number of recalls by 5%.

Target2: Reduce the number of recalls by 0%.

Result for FY2005: **Target2 achieved.**

FY04 = 46,708 recalls

FY05 = 44,527 recalls

Recalls decreased by 4.7%.

INTERNAL PROCESS PERSPECTIVE

METRIC I.1.A. PROCESSING TIME FOR ROUTINE ACQUISITIONS.

Target1: Process 90% of in-print books from North America within one month.

Target2: Process 80% of in-print books from North America within one month.

Result for FY2005: **Target2 achieved.**

Total processed = 11,559

Processed within 1 month = 10,110

Percent processed within 1 month = 87.5%

METRIC I.1.B. TURNAROUND TIME FOR RESHELVING/REFILING.

Target1: Accurately shelve/refile 85% of all materials by the end of the day following discharge regardless of where the item was discharged.

Target2: Accurately shelve/refile 75% of all materials by the end of the day following discharge regardless of where the item was discharged.

Result for FY2005: **Target2 achieved.**

Items shelved correctly within one day = 75.4%.

METRIC I.2.A. INTERNAL COMMUNICATIONS RATING.

Target1: Positive scores (4 or 5) on internal communications statements from 80% of respondents in the biennial staff work-life survey.

Target2: Positive scores (4 or 5) on internal communications statements from 60% of respondents in the biennial staff work-life survey.

Result for FY2005: Survey not fielded in FY05.

METRIC I.2.B. USABILITY TESTING OF LIBRARY WEBSITES.

Target1: At least 75% of all websites under development or review should receive heuristic evaluation and at least 50% of all such sites should receive usability testing.

Target2: At least 50% of all websites under development or review should receive heuristic evaluation and at least 25% of all such sites should receive usability testing.

Result for FY2005: **Target2 achieved.**

6 websites were under development in FY2005.

4 websites tested = 66.6%

METRIC I.3.A. PROCESS IMPROVEMENT.

Target1: Complete at least one major process improvement each year.

Target2: Complete at least one major process improvement every two years.

Result for FY2005: **Target1 achieved.**

Improvement projects for FY05: Faculty search process, classified staff search process, DLPS workflow.

METRIC I.3.B. STAFF SURVEY RATING OF INTERNAL SERVICE ACTIVITIES.

Target1: A composite rating of at least 4.00 in the annual internal services survey, with no unit rated below 3.50.

Target2: A composite rating of at least 3.50, with no unit rated below 3.00.

Result for FY2005: **Target1 achieved.**

Composite score: 4.09

Lowest unit score: 3.52

Highest unit score: 4.57

METRIC I.4.A. RELIABILITY OF EQUIPMENT.

This metric is suspended for FY05 while a new method is developed.

METRIC I.4.B. RENOVATION OF MAJOR STAFF AND PUBLIC AREAS.

Target1: Three or more major renovations per year of which at least one is a staff area and one is a public area.

Target2: Two major renovations per year of either staff or public areas.

Result for FY2005: **Target1 achieved.**

The following projects were completed in FY2004/05:

1. Refurbished Alderman 223, 223A, 217, 219, 225 227
2. Refurbished Alderman 201 & moved HR, DLPS, Financial Services into 201
3. Refurbished Alderman 215, 215A
4. Refurbished Alderman's McGregor Room as a reading room.

METRIC I.4.C. RELIABILITY OF SERVERS.

Target1: All library servers will be operational and accessible at least 98% of the time.

Target2: All library servers will be operational and accessible at least 95% of the time.

Result for FY2005: **Target1 achieved.**

9 Unix servers were up 98.66% of the time between 3/29/05 and 6/30/05.

FINANCE PERSPECTIVE

METRIC F.1.A. NON-INSTITUTIONAL (PRIVATE) EXPENDITURES AS A PROPORTION OF TOTAL UNIVERSITY LIBRARY EXPENDITURES.

Target1: Increase non-institutional expenditures as a proportion of total University Library expenditures by one half of one percent each year (11.5% for FY2005).

Target2: Increase the proportion by half a percentage point less than the Target1 indicator (11.0% for FY2005).

Result for FY2005: **Target not achieved.**

Total expenditures for FY05 = \$25,019,598.

Expenditures from non-institutional sources = \$2,421,324 or 9.7%.

Detail of non-state expenditures:

DR	401,758
ER	1,273,982
EU	375
GF	661,437
LS	84,147

METRIC F.1.B. LIBRARY EXPENDITURES AS A PROPORTION OF UNIVERSITY EXPENDITURES.

Target1: The University Libraries should continue to account for at least 4.00% of the E&G (educational and general) share of University expenditures.

Target2: The University Libraries should account for at least 3.75% of E&G.

Result for FY2005: **Target2 achieved.**

University of Virginia E&G total expenditures for FY04: \$749M

University of Virginia Libraries expenditures for FY04: \$29,354,993.

Library budget proportion of total E&G: 3.92%

Note: The University has been required to adopt a new financial accounting reporting system (GASB 34/35) that does not report an explicit E&G total. The \$749M figure is an estimate, derived from the GASB report (Total Operating Expenditures less Depreciation and Auxiliary Enterprises). In future years we will adjust this metric and use the GASB model directly.

METRIC F.1.C. AMOUNT OF DEVELOPMENT RECEIPTS THAT ARE UNRESTRICTED OR MINIMALLY RESTRICTED.

Target1: Using FY2001 as a baseline, increase unrestricted (or minimally restricted) giving by 10%.

Target2: Using FY2001 as a baseline, increase unrestricted (or minimally restricted) giving by 5%.

Result for FY2005: **Target1 achieved.**

Qualifying receipts, including unrestricted annual gifts and this year's installment on the Brown endowment, total \$752,560.

Note: Includes any funds donated (endowment, annual giving, planned gifts, etc.) for which the library may make the decision for its use and which could be used to replace state funds if needed. The baseline of FY 2000/01 was \$232,000, meaning that Target1 for FY05 was \$340,000, and Target2 was \$279,000.

METRIC F.2.A. UNIT COST OF ELECTRONIC SERIAL USE.

Target1: No increase in cost per use each year.

Target2: Less than 5% increase in cost per use each year.

Result for FY2005: **Target1 achieved.**

Cost is \$1.93 per article used; FY04 cost was \$2.34 per article used.

Note: This calculation previously included resources funded by VIVA as well as those funded directly by UVa. In FY05 we used only UVa expenditures for this metric. The FY04 unit cost per search for UVa funded databases was \$2.34. This was our baseline in determining our target for FY05.

METRIC F.2.B. UNIT COST OF ONLINE DATABASES.

Target1: No increase in unit cost each year.

Target2: Less than 5% increase in unit cost each year.

Result for FY2005: **Target1 achieved.**

Cost is \$0.97 per search for FY05, compared to \$1.05 in FY04, an 8% decrease.

Note: This calculation previously included databases funded by VIVA as well as those funded directly by UVa. In FY05 we used only UVa expenditures for this metric. The FY04 unit cost per search for UVa funded databases was \$1.05. This was our baseline in determining that we meet the target for FY05.

METRIC F.2.D. UNIT COST OF INTERLIBRARY LOAN TRANSACTIONS.

Target1: Annual percent change in unit cost will be equal to or less than annual percent change in overall library operating expenditures.

Target2: Annual change in unit cost will be within 5% of the annual percent change in overall library operating expenditures.

Result for FY2005: **Target1 met.**

Cost per transaction FY04 = \$9.75

Cost per transaction FY05 = \$10.40

6.6% increase in cost per transaction vs. 15.2% increase in overall operating expenditures.

LEARNING/GROWTH PERSPECTIVE

METRIC L.1.A. IMPACT OF TRAINING.

Target1: Positive scores (4 or 5) on training statements from 80% of respondents in the biennial work-life survey.

Target2: Positive scores (4 or 5) on training statements from 60% of respondents in the biennial work-life survey.

Result for FY2005: Survey not fielded in FY05.

METRIC L.2.A. JOB SATISFACTION AMONG LIBRARY EMPLOYEES.

Target1: Positive scores (4 or 5) on job satisfaction statements from 80% of respondents in the biennial staff work-life survey.

Target2: Positive scores (4 or 5) on job satisfaction statements from 60% of respondents in the biennial staff work-life survey.

Result for FY2005: Survey not fielded in FY05.

METRIC L.2.B. RETENTION RATE OF EMPLOYEES.

Target1: Retain 95% of employees.

Target2: Retain 90% of employees.

Result for FY2005: **Target2 achieved.**

Classified staff: 157 staff, 144 retained = 92%

Faculty: 75 faculty, 73 retained = 97%

94% overall

METRIC L.2.C. COMPARE STAFF SALARIES (FACULTY AND CLASSIFIED) TO PEER GROUPS.

Target 1:

- A faculty salary ranking in the upper 40% of all ARL university libraries, and
- 60% of classified salaries above the mean salary for similar jobs in the State of Virginia.

Target2:

- A faculty salary ranking in the upper 50% of all ARL university libraries, and
- 50% of classified salaries above the mean salary for similar jobs in the State of Virginia.

Result for FY2005: **Target2 achieved.**

Faculty ranked 47 among 113 ARL institutions = upper 41.6%.

Salary data for positions comparable to classified staff positions in Virginia is incomplete and unreliable.

METRIC L.2.D. DIVERSITY OF STAFF.

Target1: A net increase of at least 4 in faculty/staff diversity, with a net increase of at least 2 in faculty diversity.

Target2: A net increase of at least 2 in faculty/staff diversity, with a net increase of at least 1 in faculty diversity.

Result for FY2005: **Targets not met.**

0 diverse faculty hired, 2 lost

6 diverse classified hired, 0 lost

Net increase of 6 with 0 in faculty.

METRIC L.3.A. EXPENDITURES FOR DIGITAL MATERIALS.

Target1: UVa should be in the top quarter of all ARL libraries in our percentage of collections dollars expended on digital materials.

Target2: UVa should be in the top third of all ARL libraries in our percentage of collections dollars expended on digital materials.

Result for FY2005: **Targets not met.**

For FY2004, UVa ranked 57 out of 111 or in the top 51%.

METRIC L.3.B ARL INDEX RANKING.

Target1: Rank in the top 20 libraries included in the ARL Index.

Target2: Rank in the top 25 libraries included in the ARL Index.

Result for FY2005: **Target2 achieved.**

UVa Library is ranked 24th in the 2004 ARL Index.

METRIC L.3.C. FUNDING GENERATED BY RESEARCH AND DEVELOPMENT.

Target1: Over a 3-year period, grant funding brought in by Digital Library Research & Development will match 100% of the unit's operating costs.

Target2: Over a 3-year period, grant funding brought in by Digital Library Research & Development will match 80% of the unit's operating costs.

Results for FY2005: **Targets not met.**

For FY03-FY05:

Total income = \$1,158,101

Total expenses = \$1,647,278.51.

Grant income covers 70% of expenses.

METRIC L.3.D. DEVELOPMENT OF THE CENTRAL REPOSITORY.

Target1: Increase the quantity of objects made available through the central repository by 15% annually.

Target2: Increase the quantity of objects made available through the central repository by 10% annually.

Results for FY2005: **Target2 achieved.**

Digital objects as of 7/1/2004 = 42,310

Digital objects as of 7/1/2005 = 48,151

Increase of 13.8%

METRIC L.3.E. IMPLEMENTATION OF LIBRARY PLANNING INITIATIVES.

Target1: Implement 90% of the initiatives approved through the planning process for the current fiscal year.

Target2: Implement 80% of the initiatives approved through planning process for the current fiscal year.

Result for FY2005: This metric will not be tallied until the FY06 report as the planning process is on a two, rather than one, year cycle.

METRIC L.4.A. DEVELOP A CULTURE OF ASSESSMENT WITHIN THE LIBRARY.

Target1: 75% of respondents score 12 or more affirmative responses on the ARL Culture of Assessment IQ.

Target2: 50% of respondents score 12 or more affirmative responses on the ARL Culture of Assessment IQ.

Result for FY2005: **Target2 achieved.**

50.0% of library managers scored 12 statements “true” on the ARL Culture of Assessment IQ instrument.

Balanced Scorecard Data Collection FY2006

Metric Number	Metric	Result	Data
	REV: 10/5/06; 1/16/09		
	<i>User Perspective</i>		
U.1.a	Overall survey rating: faculty	1	2004 Faculty survey—overall rating: Humanities = 4.41 Sci = 4.25 SocSci = 4.42
U.1.a	Overall survey rating: student	1	2005 Student Survey--overall rating: Grads = 4.08 Undergrads = 4.13
U.1.b	Customer service rating	2	2004 faculty survey: Humanities = 4.70 Sciences = 4.51 Social Sciences = 4.61 2005 Student survey: Grads=4.37 Undergrads = 4.15
U.2.a	Instruction ratings	1	4.43 composite score for FY06
U.3.a	Circulation of new print monographs	1	Bks in sample: 24,852; Bks circulated: 15,213; % circulated: 61.2%
U.3.b	Use of Special Collections materials	1	Collection use for FY06 = 21,229. Collection use for FY05 = 12,761. Use increased by 66.4%. May be due to change in circ processing: as of 11/05 Small charges mss/archives by the box rather than by the collection.
U.4	Turnaround time for user requests:		
U.4.a	Searches	1	Searched on first day = 93.7%; notified within 4 days = 95.4%
U.4.a	Turnaround time: LEO	1	94.5% of requests were filled in 7 days.
U.4.a	Turnaround time: ISS	1	Summer 05 = 99.08%; Fall 05 = 99.38%; Spring 06 = 99.38%
U.4.b	Turnaround time: ILL Borrowing	2	71.6% of requests were filled in 7 days
U.4.b	Turnaround time: New books	1	119 of a sample of 150 new books requested by patrons were received in 7 days for 79.3%
U.4.c	Reduce # of recalls	2	FY05 = 44,527, FY06 = 43,590. Recalls for FY06 reduced by 2.1%
	<i>Internal Process Perspective</i>		
I.1.a	Processing time for routine acquisitions	2	Processed w/in 1 month = 9,359 Total processed = 10,728 Percent processed w/in 1 month = 87.2%
I.1.b	Shelving time and quality	X	Items returned in FY06 were accurately reshelved 70.61% of the time.
I.2.a	Internal communication rating	X	48.0% of respondents agreed with communication statements at 4 or 5.
I.2.b	Website usability testing	1	1 website under development in FY06 was tested for 100%
I.3.a	Process improvement	1	Triad Services Committee work concluded within FY06.
I.3.b	Service to internal customers	1	Composite score for all units (not qualities) was 4.09. Lowest score was 3.52.
I.4.a.1	Equipment: Computing problems	Data not provided	Reporting tool parameters not set to return required results. Will be addressed for FY07.
I.4.a.2	Equipment: PCS problems	1	Average resolution time for copiers was 4.96 hours; for printers, 0.37 hours.
I.4.b	Renovations	1	The following projects were completed in 2005/06: Brown SEL Research Computing Lab; Clemons study booths; HumSoc staff moved to 2nd floor; DLPS moved to 2nd floor; Cataloging moved to 2nd floor with Acquisitions; LEO Scanning & ISS consolidated & refurbished; reconfigured/refurbished Alderman 5th floor offices.
I.4.c	Reliability of servers	1	23 Unix servers were "up" 99.16% of the time between 6/30/05 and 7/2/06.

Balanced Scorecard Data Collection FY2006

Metric Number	Metric	Result	Data
	<i>Finance Perspective</i>		
F.1.a	Non-institutional expenditures	X	Total expenditures for FY06 = \$26,159,149. Expenditures from non-state sources = \$2,061,055 or 7.9%.
F.1.b	Library expends/University expends	1	University of Virginia academic division total expenditures for FY05: \$971,719,540. University of Virginia Library expenditures for FY05: \$25,019,598. Library expenditures proportion of total expenditures: 2.57%
F.1.c	Unrestricted gifts	1	Baseline = \$232,000 FY06 target1 = \$374,000. FY06 receipts = \$774,696.
F.2.a	Unit cost e-serial use	X	Cost per journal article (funded by UVA) in FY06 was \$2.10, in increase of 8.8%. Cost per journal article in FY05 was \$1.93.
F.2.b	Unit cost of database use	1	FY06 Cost is \$0.41 per search, a decrease of 57.7%; cost in FY05 of UVA funded databases was \$0.97.
F.2.d	Unit cost ILL transactions	1	ILS cost/transaction = \$8.78.xx, down 15.6%; overall lib expenditures = \$26,159,149, up 4.6%
	<i>Learning Perspective</i>		
L.1.a	Impact of training	2	64% of respondents agreed with staff development statements at 4 or 5.
L.2.a	Job satisfaction	2	65.6% of respondents agreed with job satisfaction statements at 4 or 5.
L.2.b	Retention of staff	1	Classified staff: 156 out of 161 retained: 96.8% Faculty:63 out of 67 retained: 94.0%. 96.1% overall.
L.2.c	Compare staff salaries	Data not provided	Faculty ranked 33 among 113 ARL institutions = upper 28%. Data not reliable for classified staff salaries.
L.2.d	Diversity of staff	X	1 diverse faculty hired, 1 lost. 0 diverse classified staff hired, 1 lost. Net loss of 1 with no change in faculty.
L.2.e	Attitudes toward diversity	1	80.6% of respondents agreed with diversity statements at 4 or 5.
L.3.a	Expends for electronic materials	X	For FY2005, UVa Library ranked 74 out of 109 or in the top 68%.
L.3.b	ARL Index Ranking	2	UVa ranked at 22 in the 2005 ARL Index.
L.3.c	Funding generated by R&D	1	For FY04-FY06, total income = \$1,290,838; total expenses = \$533,710. Grant income covers 241.9% of expenses.
L.3.d	Development of central repository	1	Objects as of 7/2005 = 48,141; objects as of 7/2006 =160,068; increase of 232.5%
L.3.e	Implementation of Planning Process initiatives	Data not provided	This metric will not be tallied until the FY06 report as the planning process is now on a 2, rather than 1, year cycle.
L.4.a	Culture of assessment	2	75.8% of responses were positive on the ARL Culture of Assessment IQ.

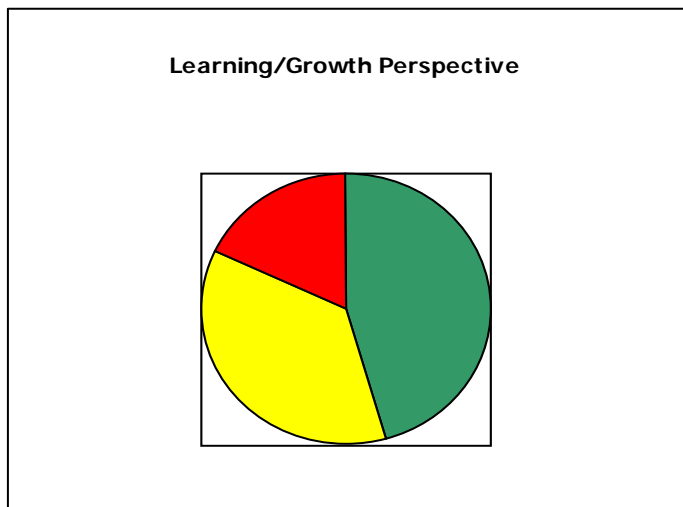
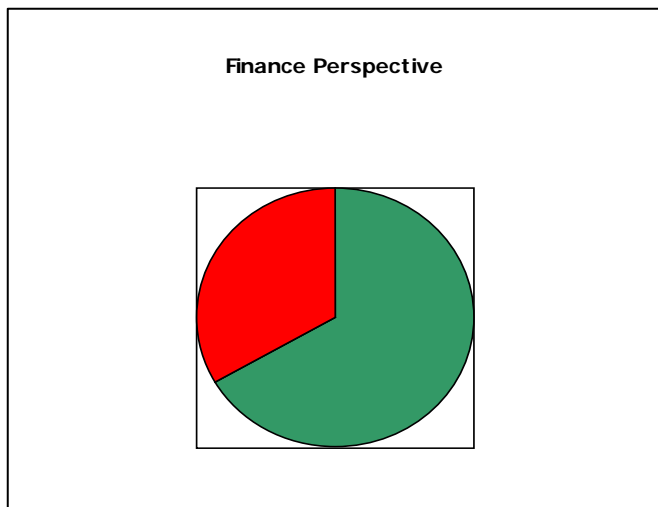
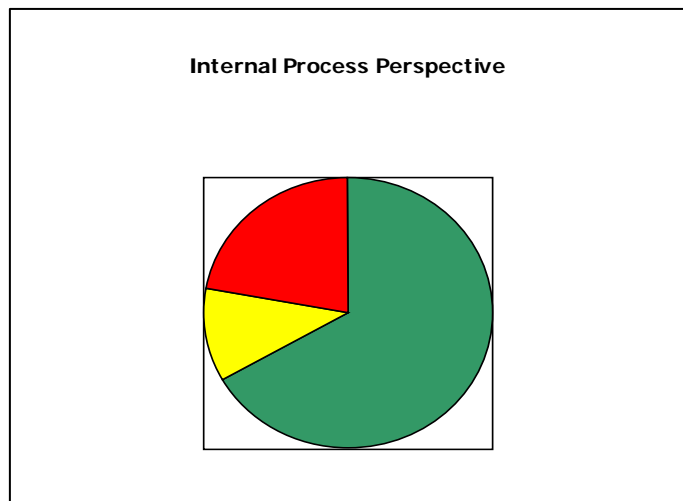
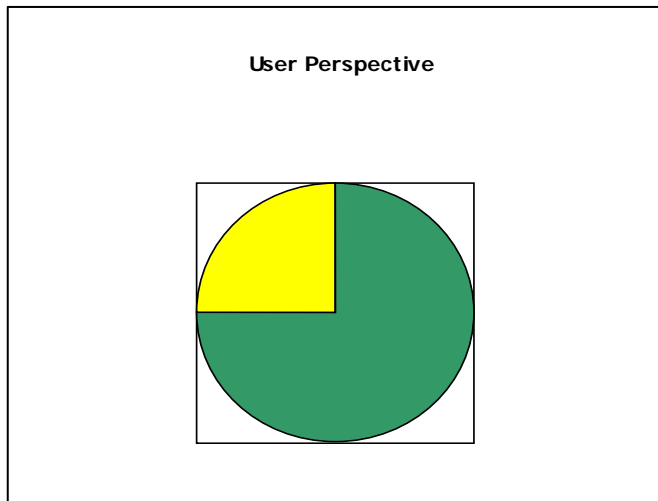
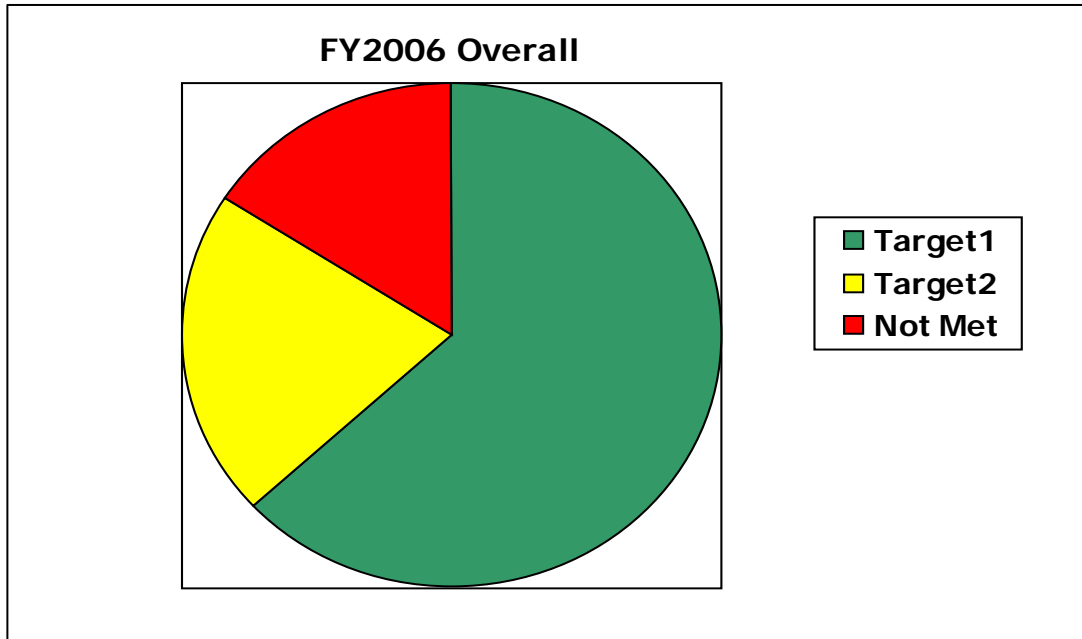
University of Virginia Library Balanced Scorecard Summary for FY2006

	Target 1 Met	Target 2 Met	Targets Not Met	Data Not Provided	<i>Composite Score¹</i>
User Perspective	U.1.a Overall survey rating: faculty U.1.a Overall survey rating: student U.2.a Instruction ratings U.3.a Circulation of new print monographs U.3.b Use of Special Collections materials U.4.a Turnaround time: LEO U.4.a Turnaround time : searches U.4.a Turnaround time: ISS U.4.b Turnaround time: new books	U.1.b. Customer service rating U.4.b Turnaround time: ILL borrowing U.4.c Reduce number of recalls			
Subtotal	9	3	0	0	0.75
Internal Process	I.2.b Website usability testing I.3.a Process improvement I.3.b Service to internal customers I.4.a.2 Equipment: PCS I.4.b Renovations I.4.c Reliability of Servers	I.1.a Processing time for routine acquisitions	I.1.b Shelving time and quality	I.2.a Internal communication rating I.4.a.1 Equipment: Computing problems	
Subtotal	6	1	2	1	0.44
Finance	F.1.b Library expends/University expends F.1.c Unrestricted gifts F.2.b Unit cost of database use F.2.d Unit cost ILL transactions		F.1.a Non-institutional expenditures F.2.a Unit cost of e-serials use		
Subtotal	4	0	2	0	0.33
Learning/Growth	L.2.b Retention of staff L.2.c Compare staff salaries (faculty) L.2.e Attitudes toward diversity L.3.c Funding generated by R&D L.3.d Development of central repository	L.1.a Impact of training L.2.a Job satisfaction L.3.b ARL Index Ranking L.4.a Culture of assessment	L.2.d Diversity of staff L.3.a Expends for electronic materials	L.2.c Compare staff salaries (classified) L.3.e Implementation of planning process initiatives	
Subtotal	5	4	2	1	0.27
Grand Total	24	8	6	2	0.47

URL: <http://www.lib.virginia.edu/bsc/>

¹For year to year comparison: #Target1-#Failures, divided by total#.

**Balanced Scorecard
University of Virginia Library
FY2006 Results**



Balanced Scorecard Results Data FY2007

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U.1.a	Overall survey rating: faculty	1	2004 Faculty survey—overall rating: Humanities = 4.41; Sci = 4.25; SocSci = 4.42
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U.1.b	Customer service rating	2	2004 faculty survey: Humanities = 4.70; Sciences = 4.51; Social Sciences = 4.61. 2005 Student survey: Grads=4.37; Undergrads = 4.15
U.2.a	User instruction ratings	1	4.46 composite score for FY07
U.2.b	User instruction satisfaction rating	2	2004 Faculty = 4.20; 2005 Undergrads = 3.76; 2005 Grads = 3.83.
U.3.a	Circulation of new print monographs	1	Bks in sample: 26,032; Bks circulated: 16,363; % circulated: 62.9%
U.3.b	Use of Special Collections materials	X	Collection use for FY07 = 19,274. Collection use for FY06 = 21,229. Use decreased by 9.2%.
U.4.a	Turnaround time: Searches	1	Searched on first day = 93.7%; Notified within 4 days = 95.5%
U.4.a	Turnaround time: LEO	1	97.9% of requests were filled in 7 days.
U.4.a	Turnaround time: ISS	1	Summer 06 =98.9%; Fall 06 = 99.1%; Spring 07 = 96.9%
U.4.b	Turnaround time: ILL Borrowing	1	75.3% of requests were filled in 7 days
U.4.b	Turnaround time: New books	1	76.8% of a sample of 150 new books requested by patrons were received in 7 days.
U.4.c	Reduce # of recalls	X	FY06 = 43,590, FY07 = 45,252. Recalls for FY07 increased by 3.8%
	<i>Internal Process Perspective</i>		
I.1.a	Processing time for routine acquisitions	1	Processed w/in 1 month = 8,209; Total processed = 8,774; Percent processed w/in 1 month = 93.6%
I.1.b	Shelving speed and quality	X	Items returned in FY07 were accurately reshelved 70.8% of the time.
I.2.a	Internal communication rating	X	48.0% of respondents agreed with communication statements at 4 or 5.
I.2.b	Website usability testing	NC	Metric suspended for FY07.
I.3.a	Process improvement	NC	Suspended for FY07
I.3.b	Internal service	NC	Metric suspended for FY07.
I.3.c	Culture of assessment	X	60.3% of responses were positive on the ARL Culture of Assessment IQ.
I.4.a.1	Equipment: Computing problems	X	Repair/fix requests: 74.4% in 48 hours. Update/install requests: 62.5% in 7 days.
I.4.a.2	Equipment: PCS problems	1	Average resolution time for copiers was 4.97 hours; for printers, 0.57 hours.
I.4.b	Renovations	1	The following projects were completed in 2006/07at a cost of \$375,000 for both public and staff areas: Google staging area; renovations to Gov Docs and Map Room; Alderman 5th floor offices; Clemons first floor study area; Clemons 2nd floor group study; Chemistry Library reconstruction; Bio/Psych recarpeting & repainting; refurbished Music Library; moved offices in Fine Arts.
I.4.c	Reliability of servers	1	6 Unix servers were "up" 99.9% of the time between 7/1/06 and 6/30/07.

Balanced Scorecard Results Data FY2007

Metric Number	Metric	Result	Data
	<i>Finance Perspective</i>		
F.1.a	Library expends/University expends	1	University of Virginia academic division total expenditures for FY06: \$963,686,627. University of Virginia Library expenditures for FY06: \$26,159,150. Library expenditures proportion of total expenditures: 2.71%
F.1.b	Minimally restricted and unrestricted development receipts	1	Baseline = \$232,000 FY07 target1 = \$411,002, Target2 = \$310,902. FY07 receipts = \$871,080.
F.2.a	Unit cost e-serial use	1	Cost per journal article (funded by UVA) in FY07 was \$1.98, a decrease of 5.7%. Cost per journal article in FY06 was \$2.10.
F.2.b	Unit cost ILL transactions	2	ILS cost/transaction = \$9.24, up 5.3%; overall lib expenditures = \$26,247,638, up 0.3%.
F.3.a	ARL Index Ranking	1	UVa ranked at 19 in the 2006 ARL Index.
	<i>Learning Perspective</i>		
L.1.a	Impact of training	2	64% of respondents agreed with staff development statements at 4 or 5.
L.1.b	Value of library training	NC	[measurement was not set up for FY07]
L.2.a	Job satisfaction	2	65.6% of respondents agreed with job satisfaction statements at 4 or 5.
L.2.b	Retention of staff	2	Classified staff: 153 out of 164 retained: 93.3% Faculty: 61 out of 67 retained: 91.0%. Overall: 214 out of 231 retained: 92.6%.
L.2.c	Compare staff salaries: Faculty	1	Faculty ranked 33 among 113 ARL institutions = upper 29%.
L.2.c	Compare staff salaries: Staff	X	32.9% of classified staff salaries are above the state-wide mean for their role in the classified system.
L.2.d	Diversity of staff	X	1 diverse faculty hired, 0 lost. 1 diverse classified staff hired, 2 lost. Net loss of 1 with +1 in faculty.
L.2.e	Attitudes toward diversity	1	80.6% of respondents agreed with diversity statements at 4 or 5.
L.3.a	Expends for electronic materials	X	For FY2006, UVa Library ranked 60 out of 118 or in the top 53.4% of ARL libraries.
L.3.b	Funding generated by R&D	1	For FY05-FY07, total income = \$470,495.47; total expenses = \$199,972.46. Grant income covers 250.3% of expenses.
L.3.c	Development of central repository	1	Objects as of 7/2006 = 160,068; Objects as of 7/2007 = 370,515; Target1 for FY07 = 64,348.

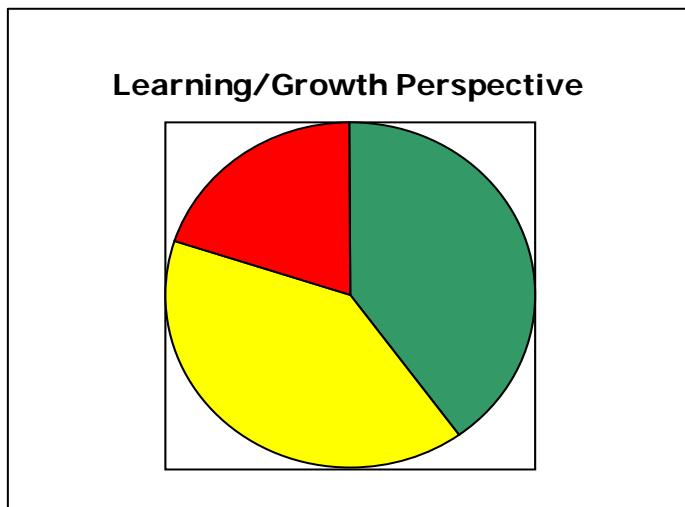
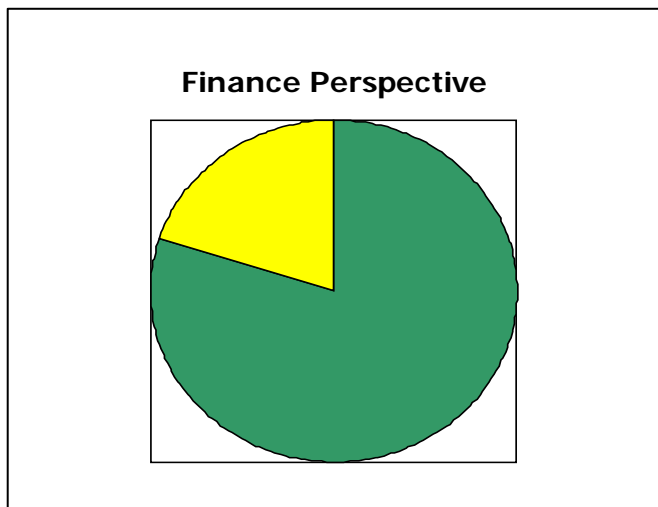
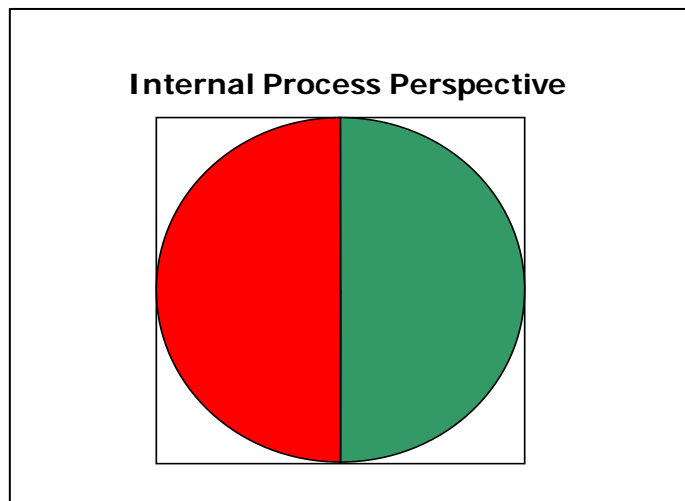
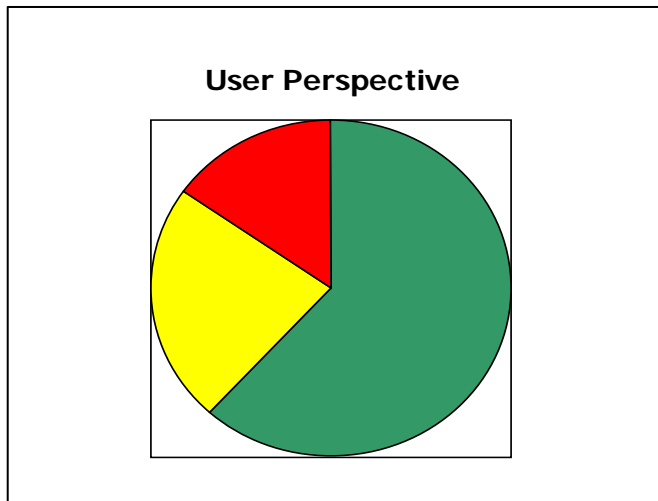
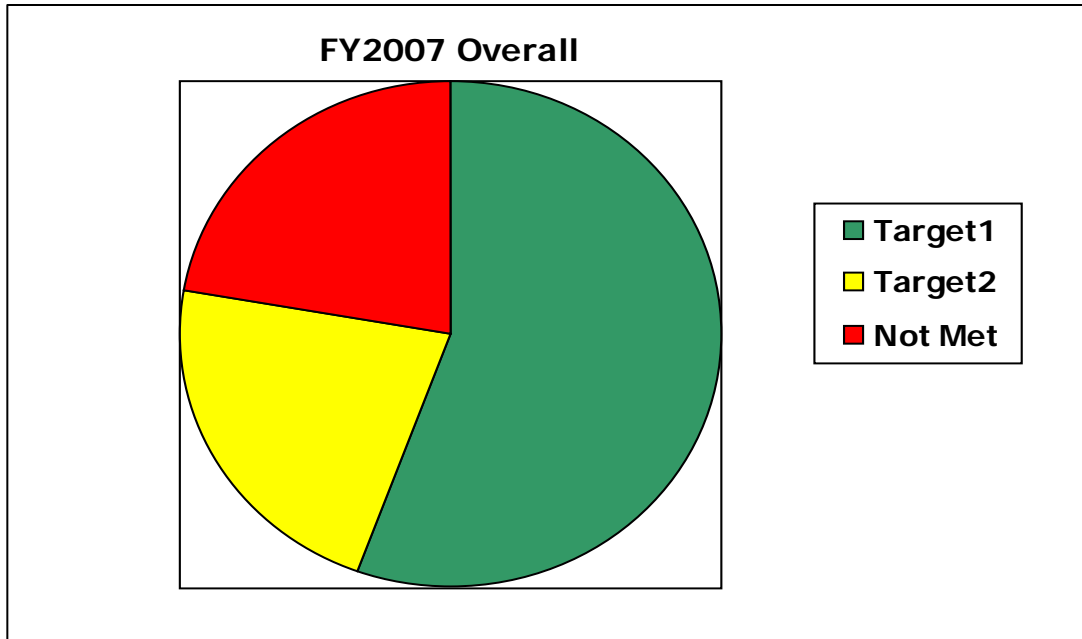
University of Virginia Library Balanced Scorecard Summary for FY2007

	Target 1 Met	Target 2 Met	Targets Not Met	Metric Suspended or Data Not Provided	Composite Score ¹
User Perspective	U.1.a Overall survey rating: faculty U.2.a User instruction ratings U.3.a Circulation of new print monographs U.4.a Turnaround time for user requests: u.4.a Turnaround time for user requests: LEO u.4.a Turnaround time for user requests: ISS U.4.b Turnaround time for user requests: ILL Borrowing U.4.b Turnaround time for user requests: new books	U.1.a Overall survey rating: student U.1.b. Customer service rating U.2.b User instruction satisfaction rating	U.3.b Use of Special Collections materials U.4.c Reduce number of recalls		
Subtotal	8	3	2	0	0.46
Internal Process	I.1.a Processing time for routine acquisitions I.4.a.2 Equipment: PCS problems I.4.b Renovations I.4.c Reliability of servers		I.1.b Shelving speed & quality I.2.a Internal communication rating I.3.c Culture of assessment I.4.a.1 Equipment: Computing Problems	I.2.b Website usability testing I.3.a Process Improvement I.3.b Internal service rating	
Subtotal	4	0	4	3	0.00
Finance	F.1.a Library expenditures as proportion of University expenditures F.1.b Minimally restricted and unrestricted development receipts F.2.a Unit cost of e-serial use F.3.a ARL index ranking	F.2.b Unit cost of ILL transactions			
Subtotal	4	1	0	0	0.80
Learning/Growth	L.2.c Compare staff salaries: faculty L.2.e Attitudes toward diversity L.3.b Funding generated by R&D L.3.c Development of Digital Repository	L.1.a Impact of training L.2.a Job satisfaction L.2.b Staff retention L.2.c Compare staff salaries: staff	L.2.d Diversity of staff L.3.a Expenditures for electronic materials	L.1.b Value of library training	
Subtotal	4	4	2	1	0.20
Grand Total	20	8	8	4	0.33

URL: <http://www.lib.virginia.edu/bsc/>

¹For year to year comparison: #Target1-#Failures, divided by total#.

**Balanced Scorecard
University of Virginia Library
FY2007 Results**



BALANCED SCORECARD METRICS 2006/2007

The *Balanced Scorecard* is a management tool designed to provide a view of an organization from four perspectives: user, internal processes, financial, and learning/growth potential. The user perspective measures service or satisfaction with service. Internal processes looks at workflow efficiency; finance, at cost effectiveness. Learning/growth tells us how well prepared we are to meet new challenges and initiate new programs. This document explains what the University of Virginia Library wants to know in each of these four areas and the specific metrics we are using to inform us about each perspective.

Each of the metrics described below contains two targets. Target1 indicates complete success in achieving the metric; Target2 indicates partial success. Management Information Services will compile and report the results of all metrics annually.

USER PERSPECTIVE: *How well is the library meeting the needs of our users?*

Goal 1. Provide excellent service to users of the University of Virginia Library

Metric U.1.a. Overall rating in student and faculty surveys.

Target1: At least 4.25 out of 5.0ⁱ from each of the major user groups: undergraduate students, graduate students, humanities faculty, social science faculty, and science faculty.

Target2: A score of at least 4.00 from each of the major user groups.

Method: The University Library regularly conducts user surveys of faculty and students. A final question in each survey asks the respondent to "rate your overall satisfaction..." with the Library. Data for this metric are compiled from responses to the latest faculty and student surveys on record.

Target1 met (faculty)

Overall ratings from the 2004 Faculty survey: Humanities = 4.41; Sciences = 4.25; Social Sciences = 4.42

Target2 met (students)

Overall ratings from the 2005 Student Survey: Grads = 4.08; Undergrads = 4.13

Metric U.1.b. Customer service rating in student and faculty surveys.

Target1: At least 4.25 out of 5.0ⁱ from each of the user groups: undergraduate students, graduate students, humanities faculty, social science faculty, and science faculty.

Target2: A score of at least 4.00 from each of the major user groups.

Method: As part of its series of user surveys, the University Library asks respondents to rate three aspects of customer service: speed, courtesy, competence. The three scores will be combined into one composite number. Data for this metric will be compiled from responses to the latest faculty and student surveys on record.

Target2 met

2004 faculty survey: Humanities = 4.70; Sciences = 4.51; Social Sciences = 4.61

2005 student survey: Grads=4.37; Undergrads = 4.15

Goal 2. Educate users in the skills necessary to fulfill their information needs

Metric U.2.a. Overall instruction rating in user education participant surveys.

Target1: An overall rating of at least 4.00 out of 5.0¹.

Target2: An overall rating of at least 3.80.

Method: Evaluation forms will be distributed to all participants of course-related user education classes at the end of each instructional session. All evaluation forms will include an identically worded question rating the overall instruction of that session¹. Scores for this question will be entered into a database. The annual overall instruction rating will be calculated using the average score of each instruction session held that year.

Target1 met

4.46 composite score for FY07

Metric U.2.b. Satisfaction rating with Library instruction in student and faculty surveys.

Target1: A score of at least 4.00 out of 5.00¹ from each of the major constituencies: undergraduate students, graduate students, humanities faculty, social science faculty, science faculty.

Target2: A score of at least 3.50 from each of the major constituencies.

Method: As part of its series of surveys, the University Library asks respondents to rate their satisfaction with various forms of instruction in the use of Library resources and services. Scores for each form of instruction will be combined to generate an average score for instruction. Data for this metric will be compiled from responses to the latest faculty and student surveys on record.

Target2 met

2004 faculty survey: 4.20

2005 student survey: Undergrads = 3.76; 2005 Grads = 3.83.

Goal 3. Develop high quality collections that reflect the needs of the Library's users and support the University's mission

Metric U.3.a. Circulation of new monographs.

Target1: 60% of all new monographs (excluding reference books and other non-circulating materials) circulate within two years of the time of cataloging.

Target2: 50% of all new titles circulate within the first two years after cataloging.

Method: A program will extract data from the SIRSI records documenting circulation of print monographs over a two-year cycle. Only items circulated to users (not binding, etc.) will be counted.

Target1 met

Books in sample: 26,032

Books circulated: 16,363

% circulated: 62.9%

Metric U.3.b. Use of Special Collections materials.

Target1: Increase by 10% annually the number of materials used or circulated in Special Collections.

Target2: Increase by 5% the number of materials used or circulated.

Method: Special Collections will perform a SIRSI check-out or item use for materials used from the collections for any purpose (patron use, classes, reference, show & tell, on hold, etc). A SIRSI report will be run at the end of the year to count the uses and charges. Data for archives is collected manually and will be added to the SIRSI data.

Targets not met

Collection use for FY07 = 19,274.
Collection use for FY06 = 21,229.
Use decreased by 9.2%.

Goal 4. Provide convenient and timely access to the Library's collections

Metric U.4.a. Turnaround time for searches, LEO, and Instructional Scanning (local resources).

Target1: Satisfy the turnaround targets 90% of the time.

Target2: Satisfy the turnaround targets 80% of the time.

Method: *Searches:* Search for requested item within 1 day and notify patron of results within 4 days of request. Staff will tally data as searches are performed, including: the number of searches requested, the number of requests processed, how quickly the search was performed, and how quickly the patron was notified. This data will be reported to Management Information Services each month.

LEO: Fill requests in 7 days. Turnaround time from patron request to delivery will be measured by ILS.

Instructional Scanning: Fill requests by agreed upon date. Instructional Scanning Services will provide a report in their database to track how quickly scanning requests are filled.

Searches: Target1 met

Searched on first day = 93.7%; notified within 4 days = 95.5%

LEO: Target1 met

97.9% of requests were filled in 7 days

Instructional Scanning Services: Target1 met

Summer 06 = 98.9%; Fall 06 = 99.1%; Spring 07 = 96.9%

Metric U.4.b. Turnaround time for new book and ILL requests (external resources).

Target1: Satisfy the turnaround targets 75% of the time.

Target2: Satisfy the turnaround targets 50% of the time.

Method: *New Books:* Fill requests in 7 days. A sample of in-print US titles requested by University-affiliated patrons will be drawn from the request database by Management Information Services. Turnaround time from patron request to availability will be measured.

ILL: Fill requests in 7 days. Turnaround time will be measured by ILS from patron request to notification that the book or article is available.

New Books: Target1 met

76.8% of a sample of 150 new books requested by patrons were received in 7 days.

ILL: Target1 met

75.3% of requests were filled in 7 days

Metric U.4.c. Reduce the number of recalls placed each year.

Target1: Reduce the number of recalls by 5%.

Target2: Reduce the number of recalls by 0%.

Method: Using data from the library's annual statistical report, compare the number of recalls placed in the current year to the number placed in the previous year.

Target not met

FY06 = 43,590

FY07 = 45,252

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Recalls for FY07 increased by 3.8%

INTERNAL PROCESS PERSPECTIVE: *How do the library's internal processes function to efficiently deliver library collections and services?*

Goal 1. Acquire, create, organize, preserve and deliver information resources in a timely, efficient, and accurate manner

Metric I.1.a. Processing time for routine acquisitions.

Target1: Process 90% of in-print books from North America within one month.

Target2: Process 80% of in-print books from North America within one month.

Method: This metric will estimate the elapsed time from ordering to delivery at the destination library. Certain classes of materials will be excluded: user requests, non-book materials, out of print books, foreign acquisitions, and orders for Special Collections, Law, and Health Sciences. The methodology will rely on SIRSI records for Yankee and New York Times/Washington Post approval orders.

Target1 met

Processed within 1 month = 8,209

Total processed = 8,774

Percent processed within 1 month = 93.6%

Metric I.1.b. Turnaround time and accuracy for reshelving/refiling.

Target1: Accurately shelve/refile 85% of all materials by the end of the day following discharge regardless of where the item was discharged.

Target2: Accurately shelve/refile 75% of all materials by the end of the day following discharge regardless of where the item was discharged.

Method: On a random hundred dates, a sample of 10 circulating books, bound journals, and documents from all libraries will be selected from the uses and discharges of the previous day for checking in the stacks. Each sample's results will be weighted according to the overall number of circulations for that day. The overall annual percentage is calculated by dividing the number of items meeting the criteria by the total sample size.

Targets not met

Items returned in FY07 were accurately reshelved, within the time limits, 70.8% of the time.

Goal 2. Operate in the most innovative, efficient, and effective way possible

Metric I.2.a. Internal communications rating.

Target1: Positive scores (4 or 5) on 80% of responses to internal communications statements in the biennial staff worklife survey that relate to: communication from administration, communication between departments, and communication within departments.

Target2: Positive scores (4 or 5) on 60% of responses to internal communications statements in the biennial staff worklife survey that relate to: communication from administration, communication between departments, and communication within departments.

Method: The University Library will conduct a worklife quality survey every other spring, alternating with the Internal Customer Service Survey. As part of the survey, each staff member will have the opportunity to rate his or her agreement with statements on aspects of internal communication on a 1 to 5 scaleⁱⁱ. The responses from the communications section will be tallied in aggregate.

Targets not met

In 2006 worklife survey, 48.0% of respondents agreed with communication statements at 4 or 5.

Metric I.2.b. Conduct regular usability testing of library websites.

Suspended for FY07 to allow time for development of a new metric focusing on more comprehensive and results-based usability testing.

Goal 3. Continuously identify, review, and improve the processes that have the greatest impact

Metric I.3.a. Process improvement.

Suspended for FY07 to determine better mechanism for identifying process to be improved and gauging success.

Metric I.3.b. Staff survey rating of internal service activities.

Target1: A composite rating of at least 4.00 in the annual internal services survey, with no unit rated below 3.50.

Target2: A composite rating of at least 3.50, with no unit rated below 3.00.

Method: The University Library will conduct an internal services survey every other spring, alternating with the worklife survey. As part of the survey, each staff member will have the opportunity to rate the performance of each service unit or activity (e.g., Administration, Acquisitions, Cataloging, Education Library, Finance, Facilities, Geostat, Interlibrary Services, Library Human Resources, Library Information Technology Services, Management Information Services, Special Collections) on a 1 to 5 scaleⁱⁱ. The composite rating will be based on the overall rating given to each unit.

Suspended for FY07.

Metric I.3.c. Develop a culture of assessment within the library.

Target1: 90% of all responses on the ARL Culture of Assessment IQ are positive.

Target2: 75% of all responses on the ARL Culture of Assessment IQ are positive.

Method: MIS will use ARL's Culture of Assessment Institutional Quotient instrument to survey department heads and associate university librarians.

Targets not met

60.3% of responses were positive on the ARL Culture of Assessment IQ instrument.

Goal 4. Provide facilities that promote staff productivity, encourage library use and ensure top quality services

Metric I.4.a. Response to equipment service requests.

Metric I.4.a.1. Resolution of reported computing problems.

Target1: 90% of LSP requests are resolved within their target time.*

Target2: 80% of LSP requests are resolved within their target time.*

Method: LITS will use the LibHelp Incident Database to track completion time for reported computing problems. *Target time for repair/fix requests is 48 hours; target time for update/install requests is 7 days. The metric statistic will reflect the proportion of all requests that are resolved within their targeted timeframe.

Targets not met

Repair/fix requests: 74.4% completed in 48 hours

Update/install requests: 62.5% completed in 7 days

Metric I.4.a.2. Resolution of reported problems with equipment provided by Printing and Copying Services (PCS).

Target1: Average resolution time for printer/copier problems is within 1 business day.**

Target2: Average resolution time for printer/copier problems is within 2 business days.**

Method: PCS will provide MIS with information on the amount of time it takes to resolve problems for all printer/copier machines in the libraries. **Business days are defined as Monday-Friday 8-5.

Target1 met

Average resolution time for copier problems was 4.97 hours; for printers, 0.57 hours.

Metric I.4.b. Renovation of major staff and public areas.

Target1: Spending a minimum of \$100,000 in the current fiscal year, renovate or plan for renovation of at least one staff area and one public area.

Target2: Spending a minimum of \$75,000 in the current fiscal year, renovate or plan for renovation of at least one staff area or one public area.

Method: The Director of Facilities will solicit suggestions for renovations at the same time as budget requests are made, and report on their completion at the end of the fiscal year.

Renovations are defined as distinct projects costing at least \$25,000 that improve service or increase staff satisfaction and productivity. Administrative team will decide renovation priorities.

Target1 met

The following projects were completed in 2006/07 at a cost of \$375,000 for both public and staff areas: Google staging area; renovations to Gov Docs and Map Room; Alderman 5th floor offices; Clemons first floor study area; Clemons 2nd floor group study; Chemistry Library reconstruction; Bio/Psych re-carpeted & repainted; refurbished Music Library; moved offices in Fine Arts.

Metric I.4.c. Reliability of servers.

Target1: Key production servers will be up at least 99.9% of the time.

Target2: Key production servers will be up at least 99.0% of the time.

Method: This metric will be based on information gathered from the Nagios telemetry tool. A server will be considered "up" if it can be located by the tool ("pinged") and account access is available. This will measure whether the server is available, but not other factors affecting access such as software crashes or broken links. Key production servers are those servers with primary functions where even a short-term downtime would hamper the library's ability to carry out its mission. Key servers in 2006-07 include scripta, virgo, viva, etext, fisher, orbis, (telemetry system).

Target1 met

The 6 Unix servers were "up" 99.9% of the time between 7/1/06 and 6/30/07.

FINANCE PERSPECTIVE: *How well are the library's finances managed to achieve our mission?*

Goal 1. Increase the financial base through private donations, other external support, and increased institutional support

Metric F.1.a. Library expenditures as a proportion of university expenditures.

Target1: The University Library will account for at least 2.50% of the total expenditures of the academic division of the University.

Target2: The University Library will account for at least 2.25% of the total expenditures of the academic division of the University.

Method: Total expenditures of the academic division of the University will be obtained from Institutional Assessment and Studies (IAAS); University Library expenditures will be obtained from Oracle. These two figures will be used to calculate the percent. When Balanced Scorecard results are released in the fall, the proportion may reflect expenditures from previous fiscal years and will be updated once current fiscal year data become available from IAAS. Note: The University now uses the GASB 34/35 accounting system.

Target1 met

University of Virginia academic division total expenditures for FY06: \$963,686,627.

University of Virginia Library expenditures for FY06: \$26,159,150.

Library expenditures proportion of total expenditures: 2.71%

Metric F.1.b. Amount of development receipts that are unrestricted or minimally restricted.

Target1: Using FY 2001 as a baseline, increase unrestricted (or minimally restricted) giving by 10% each year.

Target2: Using FY 2001 as a baseline, increase unrestricted (or minimally restricted) giving by 5% each year.

Method: Include any funds donated (endowment, annual giving, planned gifts, etc.) for which the library may make the decision for its use and which could be used to replace state funds if needed. The baseline of FY 2000/01 was \$232,000, meaning that Target1 for FY07 is \$411,000, and Target2 is \$311,000.

Target1 met

Baseline = \$232,000

FY07 Target1 = \$411,002

FY07 Target2 = \$310,902

FY07 receipts = \$871,080

Goal 2. Provide resources and services that have a high ratio of value to cost

Metric F.2.a. Unit cost of electronic serials.

Target1: No increase in cost per use each year.

Target2: Less than 5% increase in cost per use each year.

Method: Collect data annually from vendors for all electronic journals for which usage data are available. UVA's annual cost data can be gathered from SIRSI. Divide the total cost by the total uses.

Target1 met

The cost per journal article (funded by UVA) in FY07 was \$1.98, a decrease of 5.7%. The cost per journal article in FY06 was \$2.10.

Metric F.2.b. Unit cost of Interlibrary Loan transactions.

Target1: Annual percent change in unit cost will be equal to or less than annual percent change in overall library operating expenditures.

Target2: Annual change in unit cost will be within 5% of the annual percent change in overall library operating expenditures.

Method: We will calculate the expenditures and the number of transactions for ILS.

Target2 met

ILS cost/transaction = \$9.24, up 5.3%

Overall lib expenditures = \$26,247,638, up 0.3%

Goal 3. Maintain sufficient levels of investment to remain a top-flight academic library

Metric F.3.a. ARL index ranking.

Target1: Rank in the top 20 libraries included in the ARL Index.

Target2: Rank in the top 25 libraries included in the ARL Index.

Method: Each year the Association of Research Libraries (ARL) uses principal component analysis to aggregate five data categories: volumes held, volumes added (gross), current serials, total library expenditures, total professional and support staff. For each library this analysis produces the "ARL Library Membership Index."

Target1 met

UVa was ranked 19th in the 2006 ARL Index.

LEARNING/GROWTH PERSPECTIVE: *How well is the library positioned to expand our organizational capacity by creating an environment supportive of continuous personal and organizational development?*

Goal 1. Foster learning among its employees to encourage creativity, cooperation, and innovation

Metric L.1.a. Impact of Staff Development.

Target1: Positive scores (4 or 5) on 80% of responses to staff development statements in the biennial work-life survey.

Target2: Positive scores (4 or 5) on 60% of responses to staff development statements in the biennial work-life survey.

Method: The University Library will conduct a worklife quality survey every other spring, alternating with the Internal Customer Service Survey. As part of the survey, each staff member will have the opportunity to rate his or her agreement with statements on different aspects of staff development and training on a 1 to 5 scaleⁱⁱ. The responses from staff development section will be tallied in aggregate.

Target2 met

64% of 2006 worklife survey respondents agreed with staff development statements at 4 or 5.

Metric L.1.b. Value of Library-provided training.

Target1: An overall rating of at least 4.0 out of 5.0ⁱ on training evaluations.

Target2: An overall rating of at least 3.5 out of 5.0ⁱ on training evaluations.

Method: Evaluation forms will be distributed to all participants of library-provided training sessions. All evaluation forms will include an identically worded question rating the overall instruction of that session on a scale of 1 to 5ⁱ. Management Information Services will calculate the annual overall instruction rating using the average score of each instruction session held that year.

No data; measurement method was not set up for FY07.

Goal 2. Recruit, develop, and retain productive, highly qualified staff

Metric L.2.a. Job satisfaction among library employees.

Target1: Positive scores (4 or 5) on 80% of responses to job satisfaction statements.

Target2: Positive scores (4 or 5) on 60% of responses to job satisfaction statements.

Method: The University Library will conduct a work-life quality survey every other spring, alternating with the Internal Customer Service Survey. As part of the survey, each staff member will have the opportunity to rate his or her agreement with job satisfaction statements.

Target2 met

65.6% of 2006 worklife survey respondents agreed with job satisfaction statements at 4 or 5.

Metric L.2.b. Retention rate of employees.

Target1: Retain 95% of employees.

Target2: Retain 90% of employees.

Method: Staff members who have received a satisfactory, or above, rating over the previous year are identified at the beginning of each fiscal year. At the end of the fiscal year, we will determine what percentage of these employees still work at the library.

Target2 met

Classified staff: 153 out of 164 retained: 93.3%

Faculty: 61 out of 67 retained: 91.0%

Overall: 214 out of 231 retained: 92.6%

Metric L.2.c. Compare staff salaries to peer groups.

Target1:

- A faculty salary ranking in the upper 40% of all ARL university libraries, and
- 60% of classified salaries above the mean salary for similar jobs in the State of Virginia.

Target2:

- A faculty salary ranking in the upper 50% of all ARL university libraries, and
- 50% of classified salaries above the mean salary for similar jobs in the State of Virginia.

Method: Faculty salary rankings are published annually by ARL. Mean classified salary is calculated using salary information from University and Library Human Resources. NOTE: availability of classified salary information varies from year to year. In years when no classified salary data are available, the metric will be based on faculty salary comparisons only and appropriately noted.

Target not met

Faculty ranked 33 among 113 ARL institutions, or the upper 29%.

32.9% of classified staff salaries are above the state-wide mean for their role in the classified system.

Metric L.2.d. Diversity of staff

Target1: A net increase of at least 4 in faculty/staff diversity, with a net increase of at least 2 in faculty diversity.

Target2: A net increase of at least 2 in faculty/staff diversity, with a net increase of at least 1 in faculty diversity.

Method: Using EEO categories for diversity, Library Human Resources will determine the net change in staff diversity from the previous year.

Targets not met

1 diverse faculty hired, 0 lost

1 diverse classified staff hired, 2 lost

Net loss of 1 with +1 in faculty

Metric L.2.e. Attitudes toward Diversity.

Target1: Positive scores (4 or 5) on 80% of responses to diversity statements in the biennial work-life survey.

Target2: Positive scores (4 or 5) on 60% of responses to diversity statements in the biennial work-life survey.

Method: The University Library conducts a worklife quality survey every other spring, alternating with the Internal Customer Service Survey. As part of the survey, each staff member is asked to rate his or her agreement with statements on different aspects of workplace diversity on a 1 to 5 scale.ⁱⁱ The responses from the diversity section will be tallied in aggregate.

Target1 met

80.6% of 2006 worklife survey respondents agreed with diversity statements at 4 or 5.

Goal 3. Develop an innovative and effective infrastructure to support library services and various initiatives

Metric L.3.a. Expenditures for electronic materials.

Target1: Rank in the top quarter of ARL libraries in percentage of collections dollars expended on electronic materials.

Target2: Rank in the top third of all ARL libraries in percentage of collections dollars expended on electronic materials.

Method: MIS will consult ARL Supplementary Statistics for this data.

Targets not met

For FY2006, the UVa Library ranked 60 out of 118 or in the top 53.4% of ARL libraries.

Metric L.3.b. Funding generated by research and development.

Target1: Over a 3-year period, external funding brought in by Digital Library Research & Development (DLR&D) will match the institutional funding provided for the unit.

Target2: Over a 3-year period, external funding brought in by DLR&D will equal 90% of the institutional funding provided for the unit.

Method: The annual allotment from external funding for the current year and previous two fiscal years brought in by DLR&D will be summed and compared to the institutional investment in the department (state-covered personnel and OTPS) over the same time period.

Target1 met

For FY05-FY07, total income = \$470,495.47

Total expenses = \$199,972.46

Grant income covers 250.3% of expenses

Metric L.3.c. Development of the central repository.

Target1: Increase the quantity of objects in the central repository by 15% annually.

Target2: Increase the quantity of objects in the central repository by 10% annually.

Method: Fedora-generated reports will track the number of objects added to the central repository each year (including new and migrated items). A baseline report will be run at the time of the Fedora implementation (August 2004), and percentages will be based on the baseline count for the first year.

Target1 met

Objects as of 7/2006 = 160,068

Objects as of 7/2007 = 370,515

Target1 for FY07 = 64,348

ⁱ The scoring scale is 1 to 5, with 5 being “most satisfactory.”

ⁱⁱ The scoring scale is 1 to 5, with 5 being “strongly agree.”

Balanced Scorecard Data Collection

Metric Number	Metric	Result	Data
<i>User Perspective</i>			
U.1.a	Overall survey rating: faculty	1	2008 user survey—overall rating: Humanities = 4.30; Sci = 4.26; SocSci = 4.37
U.1.a	Overall survey rating: student	2	2008 Student Survey--overall rating: Grads = 4.27 Undergrads = 4.17
U.1.b	Customer service rating	1	2008 user survey: Humanities = 4.56; Sciences = 4.55; Social Sciences = 4.69; Grads=4.43; Undergrads = 4.33
U.2.a	User instruction ratings	1	4.45 composite score for FY08
U.2.b	User instruction satisfaction rating	X	2008 User Survey: Faculty = 4.37; Undergrads = 3.70; Grads = 4.03.
U.3.a	Circulation of new print monographs	2	Bks in sample: 26,396 Bks circulated: 15,461 % circulated: 58.6%
U.3.b	Use of Special Collections materials	X	Collection use for FY07 = 19,274. Collection use for FY08 = 10,521. Use decreased by 45.4%.
U.4.a	Turnaround time: Searches	1	Searched on first day = 96.2% Notified within 4 days = 94.5%
U.4.a	Turnaround time: LEO	NC	Unable to extract data from ILLiad
U.4.a	Turnaround time: ISS	NC	Data is not reliable. Based on requests received via email or in person. Does not include e-requests recorded in ILLIAD. Summer 07 =98.1%; Fall 07 = 98.91%; Spring 08 = 95.1%
U.4.b	Turnaround time: ILL Borrowing	2	62.4% (7970) of 12,776 requests were filled in 7 days.
U.4.b	Turnaround time: New books	2	60% of a sample of 105 new books requested by patrons were received in 7 days.
U.4.c	Reduce # of recalls	1	FY07= 40,516; FY08 = 35,418. Recalls for FY08 decreased by 12.4%
<i>Internal Process Perspective</i>			
I.1.a	Processing time for routine acquisitions	1	Processed w/in 1 month = 7917 Total processed = 7,951 Percent processed w/in 1 month = 99.6%
I.1.b	Shelving speed and quality	2	81.7% of items returned in FY08 were accurately reshelved within the time frame.
I.1.c	Preservation	X	Baseline = 397. Results for FY08 = 411 or 3.5%.
I.2.a	Internal communication rating	NC	Survey not administered in FY08.
I.2.b	Website usability testing	NC	Metric suspended for FY08.
I.3.a	Process improvement	1	Development database (phase 1); Interlibrary Loan trusted sender program; Slide scanning workflows; Shelf preparation processing; Remote access for server management.
I.3.b	Internal service	NC	Survey not administered in FY08.
I.3.c	Culture of assessment	X	73.5% of responses were positive on the ARL Culture of Assessment IQ.
I.4.a.1	Equipment: Computing problems	X	Repair/fix requests: 80.3% in 48 hours. Update/install requests: 78.5% in 7 days.
I.4.a.2	Equipment: PCS problems	NC	Data not available for FY08. Ricoh switched to Oracle and data was lost.

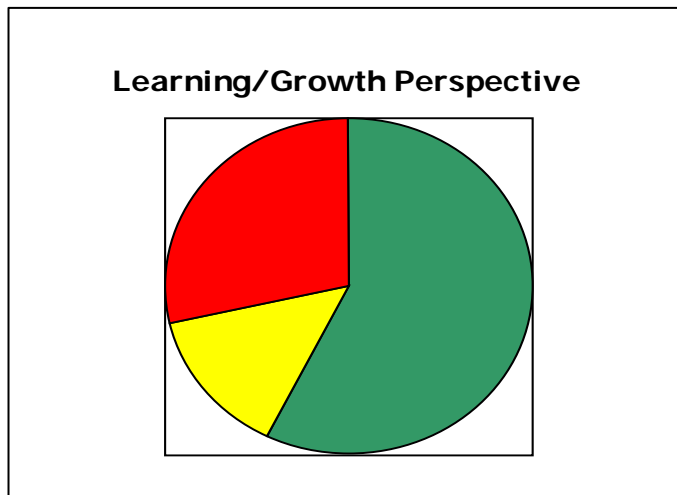
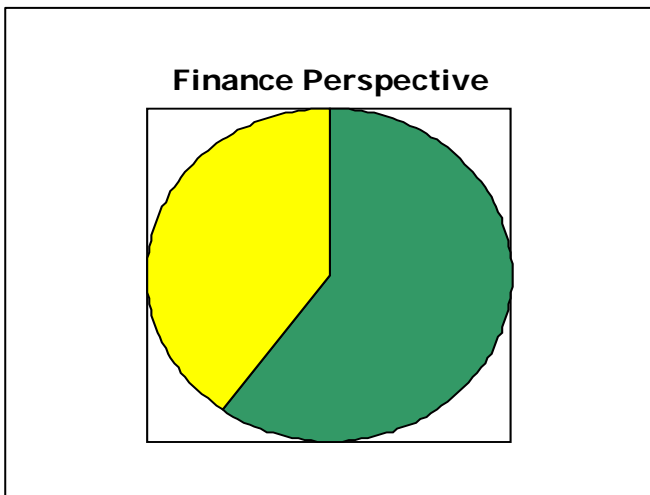
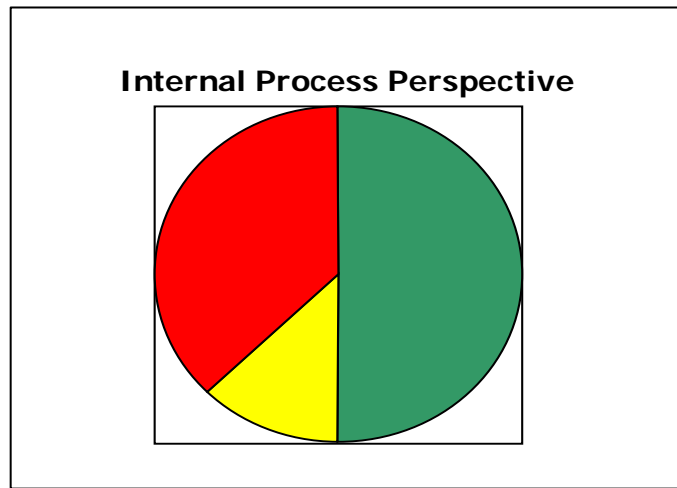
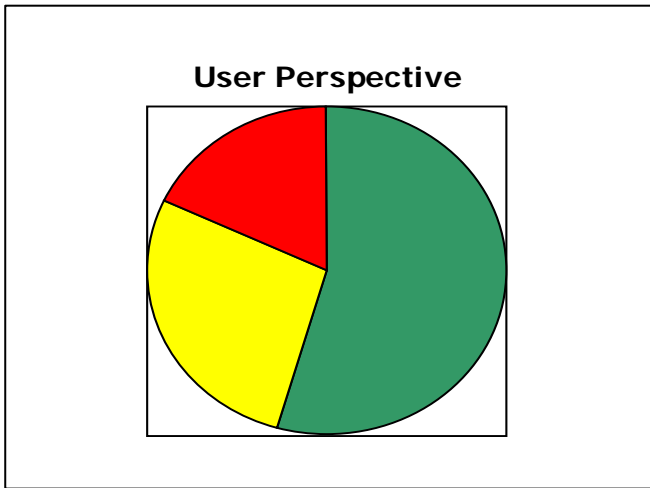
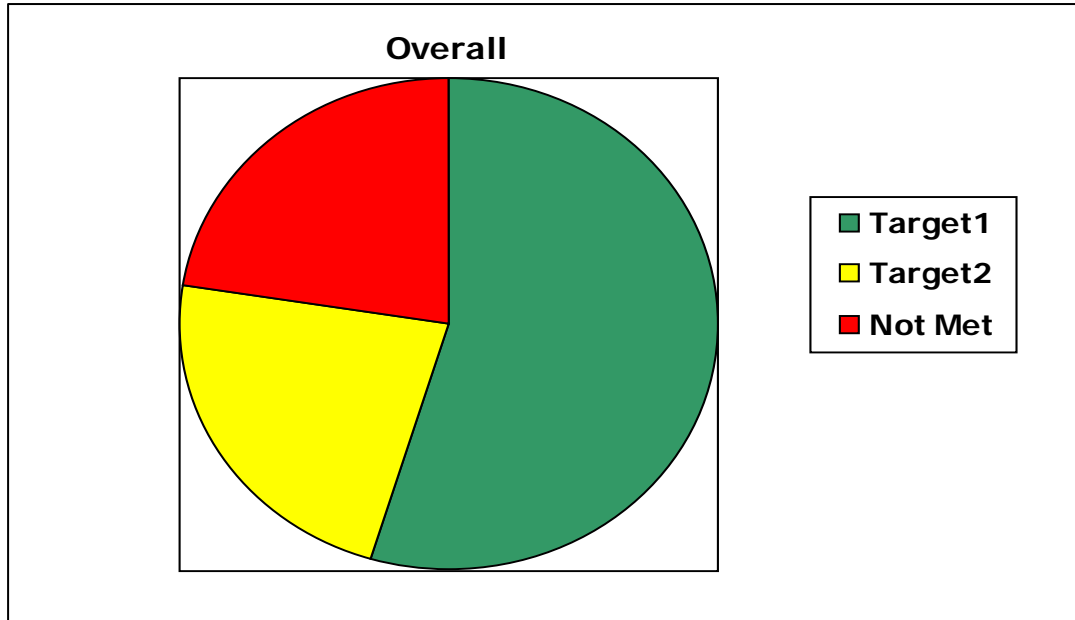
Balanced Scorecard Data Collection

Metric Number	Metric	Result	Data
<i>Internal Process Perspective, cont</i>			
I.4.b	Renovations	1	The following projects were completed in 2007/08 at a cost of \$1,844,200 for both public and staff areas: International Media Wall in Alderman; reconfigured Digitization Services room in Alderman; completed renovations to 3rd floor Alderman; Clemons Fourth Floor computer project; Clemons Terrace re-roofing.
I.4.c	Reliability of servers	1	5 Unix servers were "up" 99.99% of the time between 7/1/07 and 6/30/08.
<i>Finance Perspective</i>			
F.1.a	Library expends/University expends	1	University of Virginia academic division total expenditures for FY07: \$1,022,560,997. University of Virginia Library expenditures for FY07: \$26,247,638. Library expenditures proportion of total expenditures: 2.57%
F.1.b	Unrestricted gifts	1	Baseline = \$232,000, FY08 target1 = \$452,102, Target2 = \$326,447. FY08 receipts = \$798,030.
F.2.a	Unit cost e-serial use	1	Cost per journal article (funded by UVA) in FY08 was \$1.86, a decrease of 6.1%. Cost per journal article in FY07 was \$1.98.
F.2.b	Unit cost ILL transactions	2	ILS cost/transaction = \$10.94, up 18.3%; overall lib expenditures = \$30,724,774, up 17.1%.
F.3.a	ARL Index Ranking	2	UVa ranked at 24 in the 2007 ARL Index.
<i>Learning Perspective</i>			
L.1.a	Impact of training	NC	Survey not administered in FY08
L.1.b	Value of library training	1	Average score for 136 classes in FY08 was 4.35.
L.2.a	Job satisfaction	NC	Survey not administered in FY08
L.2.b	Retention of staff	1	Classified staff: 167 out of 172 retained: 97.1% Faculty: 60 out of 68 retained: 88.2%. Overall: 227 out of 240 were retained: 94.6%.
L.2.c	Compare staff salaries: Faculty	1	Faculty ranked 36 among 113 ARL institutions = upper 32%.
L.2.c	Compare staff salaries: Staff	2	54.9% of classified staff salaries are above the state wide mean for their role in the classified system.
L.2.d	Ethnic diversity of staff	X	Scores: Faculty = 0, Classified = 0, Students = 2 Total = 2.
L.2.e	Attitudes toward diversity	NC	Survey not administered in FY08
L.3.a	Expenditures for electronic materials	X	For FY2007, UVa Library ranked 45 out of 113 or in the top 39.8% of ARL libraries.
L.3.b	Funding generated by R&D	NC	Suspended indefinitely.
L.3.c	Development of central repository	1	Objects as of 7/2007 = 370,515. Objects as of 7/2008 = 392,191 Target1 for FY08 = 74,000.

Balanced Scorecard Summary for FY2008

	Target 1 Met	Target 2 Met	Targets Not Met	Metric Suspended or Data Not Provided
User Perspective	U1a. Overall survey rating: faculty U1b. Customer service rating U2a. User instruction ratings U4a. Turnaround time: searches U4b. Turnaround time: ILL U4c. Reduce number of recalls	U1a. Overall survey rating: students U3a. Circulation of new print monographs U4b. Turnaround time: New books	U2b. User instruction satisfaction rating U3b. Use of Special Collections materials	U4a. Turnaround time: ISS U4a. Turnaround time: LEO
Subtotal	6	3	2	2
Internal Process	I1a. Processing time for routine acquisitions I3a. Process improvement I4b. Renovations I4c. Reliability of servers	I1b. Shelving speed & quality	I1c. Preservation I3c. Culture of Assessment I4a1. Equipment: computing problems	I2a. Internal communication rating I2b. Website usability testing I3b. Internal service rating I4a2. Equipment: PCS problems
Subtotal	4	1	3	4
Finance	F1a. Library expenditures/University expenditures F1b. Unrestricted or minimally restricted donations F2a. Unit cost of electronic serials	F2b. Unit cost of ILL transactions F3a. ARL Index ranking		
Subtotal	3	2	0	0
Learning/Growth	L1b. Value of library training L2b. Retention of staff L2c. Compare staff salaries: Faculty L3c. Development of central digital repository	L2c. Compare staff salaries: Classified	L2d. Ethnic diversity of staff L3a. Expenditures for electronic materials	L1a. Impact of training L2a. Job satisfaction L2e. Attitudes toward diversity L3b. Funding generated by R&D
Subtotal	4	1	2	4
Grand Total	17	7	7	10

**Balanced Scorecard
University of Virginia Library
FY2008 Results**



Balanced Scorecard Data Collection FY2009

Metric Number	Metric	Result	Data
	<i>User Perspective</i>		
U.1.a	Overall survey rating: faculty	2	2009 user survey—overall rating: Humanities = 4.48; Sci = 4.32; SocSci = 4.00
U.1.a	Overall survey rating: student	1	2009 Student Survey--overall rating: Grads = 4.26 Undergrads = 4.23
U.1.b	Customer service rating	1	2009 user survey: Humanities = 4.79; Sciences = 4.81; Social Sciences = 4.46; Grads=4.53; Undergrads = 4.28
U.2.a	User instruction ratings	1	4.49 composite score for FY09
U.2.b	User instruction satisfaction rating	X	2009 User Survey: Faculty = 4.18; Undergrads = 3.63; Grads = 3.98
U.3.a	Circulation of new print monographs	2	Bks in sample: 27,655 Bks circulated: 15,089 % circulated: 54.6%
U.3.b	Use of Special Collections materials	X	Collection use for FY08 = 10,521. Collection use for FY09 = 9,781. Use decreased by 7.0%
U.4.a	Turnaround time: Searches	2	Searched on first day = 83.7% Notified within 4 days = 94.4%
U.4.a	Turnaround time: LEO	1	97% (8,653) of 8,922 requests were filled within 7 days
U.4.a	Turnaround time: ISS	NC	
U.4.b	Turnaround time: ILL Borrowing	2	63.2% (6,064) of 9,602 requests were filled in 7 days
U.4.b	Turnaround time: New books	X	48% of a sample of 150 new books requested by patrons were received in 7 days
U.4.c	Reduce # of recalls	2	FY08 = 35,800; FY09 = 35,758 . Recalls for FY09 decreased by 0.1%
	<i>Internal Process Perspective</i>		
I.1.a	Processing time for routine acquisitions	1	Processed w/in 1 month = 7,917 Total processed = 8,020 Percent processed w/in 1 month = 98.7%
I.1.b	Shelving speed and quality	X	61.8% of items returned in FY09 were accurately reshelved within the time frame
I.1.c	Preservation	1	Baseline = 476. Results for FY09 = 1,042 or 119% over baseline
I.2.a	Internal communication rating	X	41.1% scored communication positively
I.2.b	Website usability testing	NC	Metric suspended for FY09
I.3.a	Process improvement	1	FY09: Streamlining PTAO structure; revision of budget process; new service model for the Education Library
I.3.b	Internal service	NC	Survey not administered in FY09
I.3.c	Culture of assessment	X	55.1% of responses were positive on the ARL Culture of Assessment survey
I.4.a.1	Equipment: Computing problems	X	Repair/fix requests: 78.3% in 48 hours. Update/install requests: 82.7% in 7 days
I.4.a.2	Equipment: PCS problems	NC	Data not available for FY09

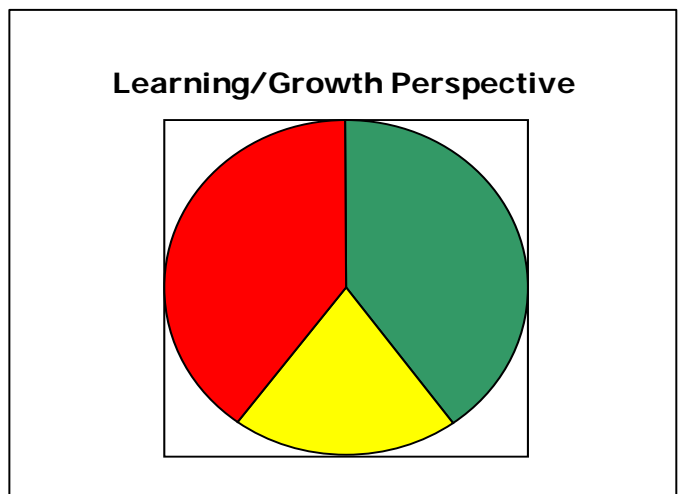
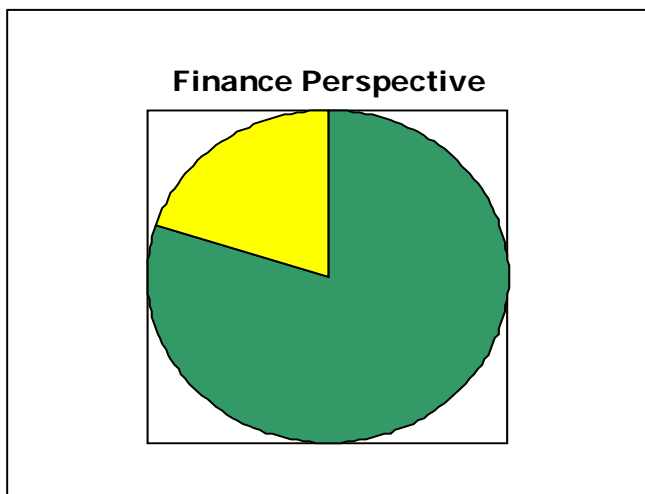
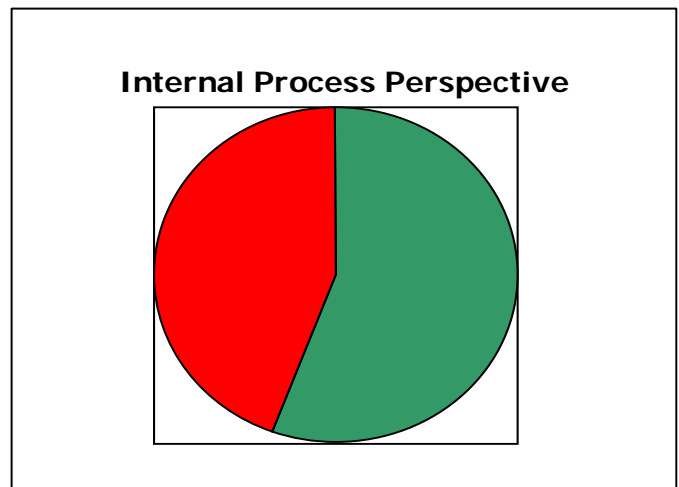
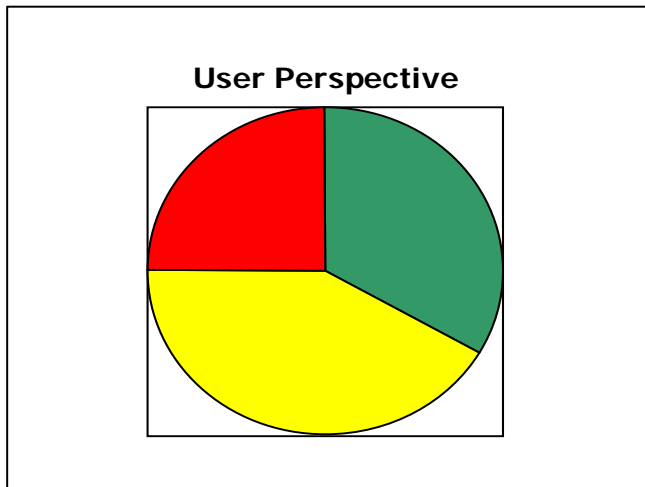
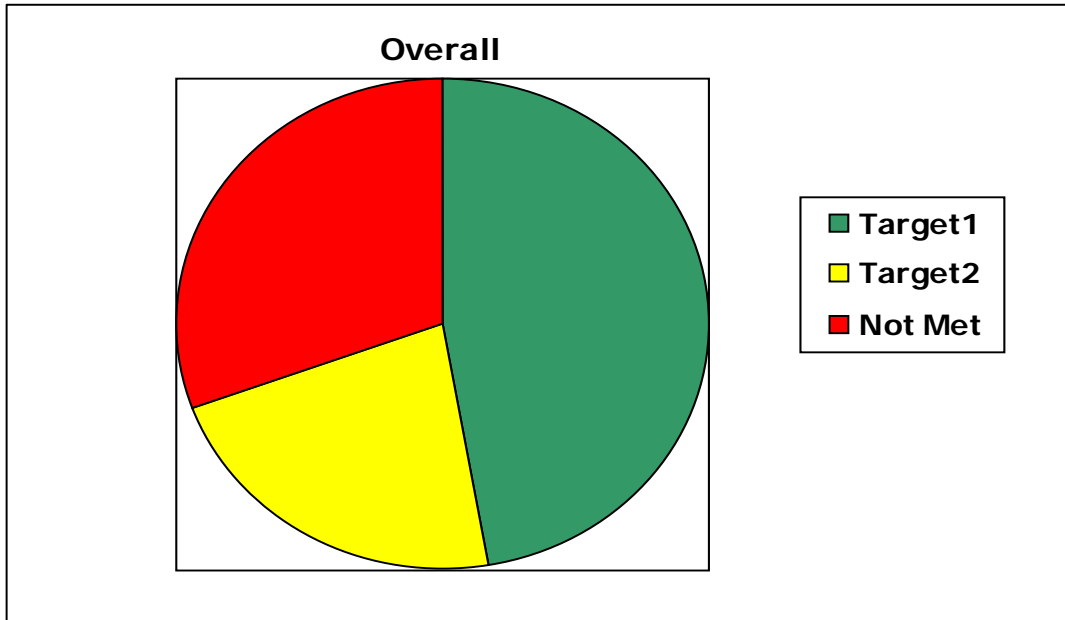
Balanced Scorecard Data Collection FY2009

Metric Number	Metric	Result	Data
I.4.b	Renovations	1	The following projects were completed in 2008/09 at a cost of \$357,500 for both public and staff areas: Alderman Cafe refurbishment; classroom upgrades in Clemons; new group study rooms in Clemons; RMC G-Lab upgrade; RMC DML retrofit; Dell Conservation Lab established; Fine Arts Library Great Room upgrade
I.4.c	Reliability of servers	1	5 Unix servers were "up" 99.928% of the time between 7/1/08 and 6/30/09
	<i>Finance Perspective</i>		
F.1.a	Library expends/University expends	1	University of Virginia academic division total expenditures for FY08: \$1,147,770,429. University of Virginia Library expenditures for FY08: \$30,724,774. Library expenditures proportion of total expenditures: 2.68%.
F.1.b	Unrestricted gifts	1	Baseline = \$232,000, FY09 Target1 = \$497,313, Target2 = \$342,770, FY09 receipts = \$776,228
F.2.a	Unit cost e-serial use	1	Cost per journal article (funded by UVA) in FY09 was \$1.70, a decrease of 8.6%. Cost per journal article in FY08 was \$1.86.
F.2.b	Unit cost ILL transactions	1	ILS cost/transaction = \$10.05, down 8.1%; overall lib expenditures = \$8,947,852, down 5.4%
F.3.a	ARL Index Ranking	2	UVa ranked at 24 in the 2008 ARL Index
	<i>Learning Perspective</i>		
L.1.a	Impact of training	X	56.2% scored staff development positively
L.1.b	Value of library training	1	Average score for 167 classes in FY09 was 4.57
L.2.a	Job satisfaction	2	61.1% scored job satisfaction positively
L.2.b	Retention of staff	1	Classified staff: 165 out of 168 retained: 98.2% Faculty: 73 out of 75 retained: 97.3%. Overall: 238 out of 243 were retained: 97.9%.
L.2.c	Compare staff salaries: Faculty	1	Faculty ranked 44 among 113 ARL institutions = upper 39%
L.2.c	Compare staff salaries: Staff	X	49.1% of classified staff salaries are above the state wide mean for their job "role" in the classified system
L.2.d	Ethnic diversity of staff	X	Scores: Faculty = 0, Classified = 0, Students = 2 Total = 2
L.2.e	Attitudes toward diversity	2	76.3% scored attitudes toward diversity positively
L.3.a	Expenditures for electronic materials	X	For FY08, UVa Library ranked 86 out of 111 or in the top 77.5% of ARL libraries
L.3.b	Funding generated by R&D	NC	Suspended indefinitely
L.3.c	Development of central repository	1	Objects as of 7/2008 = 392,191 Objects as of 7/2009 = 390,788 Target1 for FY09 = 85,101

Balanced Scorecard Summary for FY2009

	Target 1 Met	Target 2 Met	Targets Not Met	Metric Suspended or Data Not Provided
User Perspective	U.1.a Overall survey rating: Students U.1.b Customer service rating U.2.a User instruction ratings U.4.a Turnaround time: LEO	U.1.a Overall survey rating: faculty U.3.a Circulation of new monographs U.4.a Turnaround time: Searches U.4.b Turnaround time: ILL borrowing U.4.c Reduce # of recalls	U.2.b User instruction satisfaction rating U.3.b Use of Special Collections U.4.b Turnaround time: New books	U.4.a Turnaround time: ISS
Subtotal	4	5	3	1
Internal Process	I.1.a Processing time for routine acquisitions I.1.c Preservation of library materials I.3.a Process improvement I.4.b Renovations 1.4.c Reliability of servers		I.1.b Shelving time & quality I.2.a Internal communication rating I.3.c Culture of assessment I.4.a.1 Equipment: Computing problems	1.2.b Website usability testing I.3.b Internal service I.4.a.2 Equipment: PCS problems
Subtotal	5	0	4	3
Finance	F.1.a Library/University Expenditures F.1.b Unrestricted gifts F.2.a Unit cost of e-journal usage F.2.b Unit cost of ILL transactions	F.3.a ARL ranking		
Subtotal	4	1	0	0
Learning/Growth	L.1.b Value of library training L.2.b Staff retention L.2.c Compare salaries: faculty L.3.c Development of central repository	L.2.a Job satisfaction L.2.e Attitudes toward diversity	L.1.a Impact of training L.2.C Compare salaries: staff L.2.d Ethnic diversity of staff L.3.a Expenditure for electronic materials	L.3.b Funding generated by R&D
Subtotal	4	2	4	1
Grand Total	17	8	11	5

**Balanced Scorecard
University of Virginia Library
FY2009 Results**



Balanced Scorecard Data Collection: FY10

For FY2010, our Balanced Scorecard has been in a transitional year. We are continuing to examine our Balanced Scorecard structure and process. We should be instituting a new scorecard in the next year or so. For FY10, rather than measure all of our metrics, we focused on the truly "big picture" ones having to do with our users' appraisals and our financial health. Those results are below.

Metric Number	Metric	Result	Data
<i>User Perspective</i>			
U.1.a	Overall survey rating: faculty	2	2008/10 user surveys—overall rating: Humanities = 4.39; Sci = 4.15; SocSci = 4.24
U.1.a	Overall survey rating: student	2	2008/10 Student Survey--overall rating: Grads = 4.17 Undergrads = 4.15
<i>Finance Perspective</i>			
F.1.a	Library expends/University expends	2	University of Virginia academic division total expenditures for FY09: \$1,207,000,000. University of Virginia Library expenditures for FY09: \$28,968,113. Library expenditures proportion of total expenditures: 2.40%.
F.1.b	Unrestricted gifts	1	Baseline = \$232,000, FY10 Target1 = \$547,044, Target2 = \$359,908, FY10 receipts = \$797,499

Longitudinal Results -- FY2002-FY2009

2009	Metric	FY02	FY03	FY04	FY05	FY06	FY07	FY08	FY09
U1a	Overall Survey: Faculty	1	1	1	1	1	1	1	2
U1a	Overall Survey: Students	1	1	NC	1	1	1	2	1
U1b	Customer Service Rating		2	1	2	2	2	1	1
U2a	Instruction Rating	2	NC	2	1	1	1	1	1
U2b	Instruction satisfaction rating						2	X	X
U3a	Circulation of new monographs:print	2	1	1	2	1	1	2	2
U3b	Use of Special Collections	X	2	X	1	1	X	X	X
U4a	Turnaround time searches	1	1	1	X	1	2	1	2
U4a	Turnaround time LEO	NC	2	1	1	1	1	NC	1
U4a	Turnaround time ISS	NC	1	1	1	1	1	NC	NC
U4b	Turnaround time ILL borrowing	NC	X	X	2	2	1	2	2
U4b	Turnaround time new books	NC	X	X	2	1	1	2	X
U4c	Reduce # of Recalls	1	X	X	2	2	X	1	2
I1a	Processing time for routine acquisitions	2	1	2	2	2	1	1	1
I1b	Shelving time and quality	X	X	2	2	X	X	2	X
I1c	Preservation							X	1
I2a	Internal communications rating			X	NC	X	X	NC	X
I2b	Website usability testing	X	X	1	2	1	NC	NC	NC
I3a	Process Improvement	1	1	1	1	1	NC	1	1
I3b	Internal service	2	2	NC	1	1	NC	NC	NC
I3c	Culture of assessment	X	NC	X	2	2	X	X	X
I4a1	Equipment: Computing problems					NC	X	X	X
I4a2	Equipment: PCS problems					1	1	NC	NC
I4b	Renovations	1	1	1	1	1	1	1	1
I4c	Reliability of servers				1	1	1	1	1
F1a	Library expends/Univ expends	1	1	2	2	1	1	1	1
F1b	Unrestricted donations			1	1	1	1	1	1
F2a	Unit cost of e-journal use	NC	1	1	1	X	1	1	1
F2b	Unit cost of ILS	NC	2	1	1	1	2	2	1
F3a	ARL Index Ranking	2	2	2	2	2	1	2	2
L1a	Impact of training			X	NC	2	2	NC	X
L1b	Value of library training						NC	1	1
L2a	Job satisfaction of employees			X	NC	2	2	NC	2
L2b	Staff retention	1	2	2	2	1	2	1	1
L2c	Compare staff salaries to peers: Faculty			2	2	1	1	1	1
L2c	Compare staff salaries to peers: Staff			NC	NC	NC	X	2	X
L2d	Diversity of staff			1	X	X	X	X	X
L2e	Attitudes toward diversity					1	1	NC	2
L3a	Expenditures for electronic material	X	X	X	X	X	X	X	X
L3b	Funding generated by R&D				1	1	1	NC	NC
L3c	Development of central repository				2	1	1	1	1
	NC =	6	2	3	4	2	4	10	5

Longitudinal Results -- FY2002-FY2009

2009	Metric	FY02	FY03	FY04	FY05	FY06	FY07	FY08	FY09
	Used monographs/total monographs	X	2						
	Unit cost of acquisitions	1	1	NC					
	Unit cost of cataloging	1	X	NC					
	Unit cost of public services: circ	NC	1	NC					
	Unit cost of public services: ref	NC	X	NC					
	Equipment Reliability	NC	1	1	NC				
	Non-institutional Expenditures	1	1	2	X	X			
	Unit cost of database use	1	1	X	1	1			
	Develop learning plans	2	NC						
	Increase digital access	X	X	1					
	Unit cost of DLPS			NC					
	Implement Planning Day initiatives				NC	NC			

= not in scorecard

NC = not collected


Longitudinal Results -- FY2002-FY2010


2010	Metric	FY02	FY03	FY04	FY05	FY06	FY07	FY08	FY09	FY10
U1a	Overall Survey: Faculty	1	1	1	1	1	1	1	2	2
U1a	Overall Survey: Students	1	1	NC	1	1	1	2	1	2
U1b	Customer Service Rating		2	1	2	2	2	1	1	
U2a	Instruction Rating	2	NC	2	1	1	1	1	1	
U2b	Instruction satisfaction rating						2	X	X	
U3a	Circulation of new monographs:print	2	1	1	2	1	1	2	2	
U3b	Use of Special Collections	X	2	X	1	1	X	X	X	
U4a	Turnaround time searches	1	1	1	X	1	2	1	2	
U4a	Turnaround time LEO	NC	2	1	1	1	1	NC	1	
U4a	Turnaround time ISS	NC	1	1	1	1	1	NC	NC	
U4b	Turnaround time ILL borrowing	NC	X	X	2	2	1	2	2	
U4b	Turnaround time new books	NC	X	X	2	1	1	2	X	
U4c	Reduce # of Recalls	1	X	X	2	2	X	1	2	
I1a	Processing time for routine acquisitions	2	1	2	2	2	1	1	1	
I1b	Shelving time and quality	X	X	2	2	X	X	2	X	
I1c	Preservation							X	1	
I2a	Internal communications rating			X	NC	X	X	NC	X	
I2b	Website usability testing	X	X	1	2	1	NC	NC	NC	
I3a	Process Improvement	1	1	1	1	1	NC	1	1	
I3b	Internal service	2	2	NC	1	1	NC	NC	NC	
I3c	Culture of assessment	X	NC	X	2	2	X	X	X	
I4a1	Equipment: Computing problems					NC	X	X	X	
I4a2	Equipment: PCS problems					1	1	NC	NC	
I4b	Renovations	1	1	1	1	1	1	1	1	
I4c	Reliability of servers				1	1	1	1	1	
F1a	Library expends/Univ expends	1	1	2	2	1	1	1	1	2
F1b	Unrestricted donations			1	1	1	1	1	1	1
F2a	Unit cost of e-journal use	NC	1	1	1	X	1	1	1	
F2b	Unit cost of ILS	NC	2	1	1	1	2	2	1	
F3a	ARL Index Ranking	2	2	2	2	2	1	2	2	
L1a	Impact of training			X	NC	2	2	NC	X	
L1b	Value of library training						NC	1	1	
L2a	Job satisfaction of employees			X	NC	2	2	NC	2	
L2b	Staff retention	1	2	2	2	1	2	1	1	
L2c	Compare staff salaries to peers: Faculty			2	2	1	1	1	1	
L2c	Compare staff salaries to peers: Staff			NC	NC	NC	X	2	X	
L2d	Diversity of staff			1	X	X	X	X	X	
L2e	Attitudes toward diversity					1	1	NC	2	
L3a	Expenditures for electronic material	X	X	X	X	X	X	X	X	
L3b	Funding generated by R&D				1	1	1	NC	NC	
L3c	Development of central repository				2	1	1	1	1	


= not in scorecard

NC = not collected

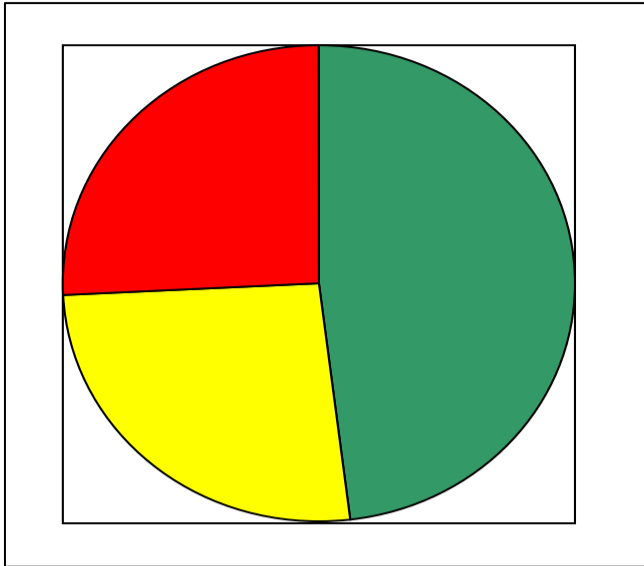
Overall Results FY2002-2009

 = Target 1

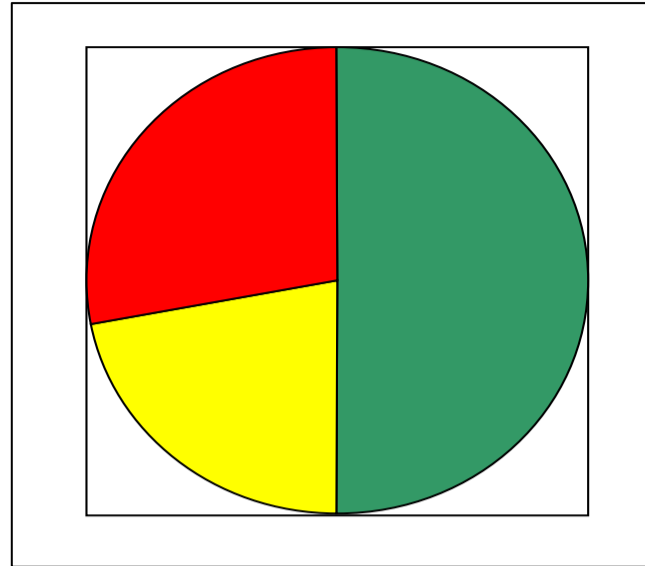
 = Target 2

 = Target not met

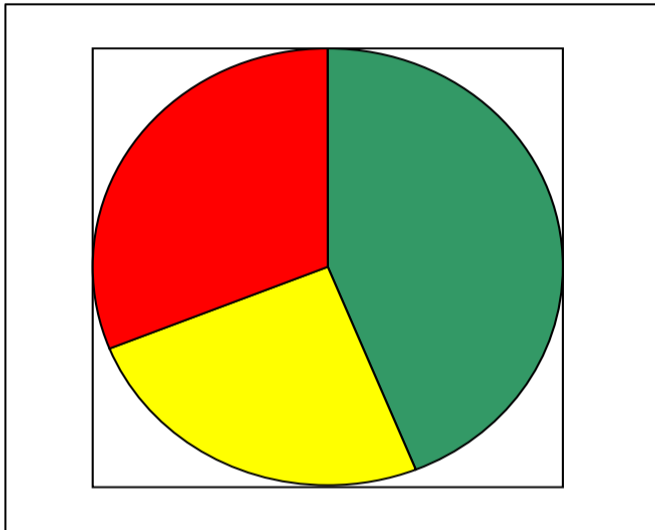
FY02



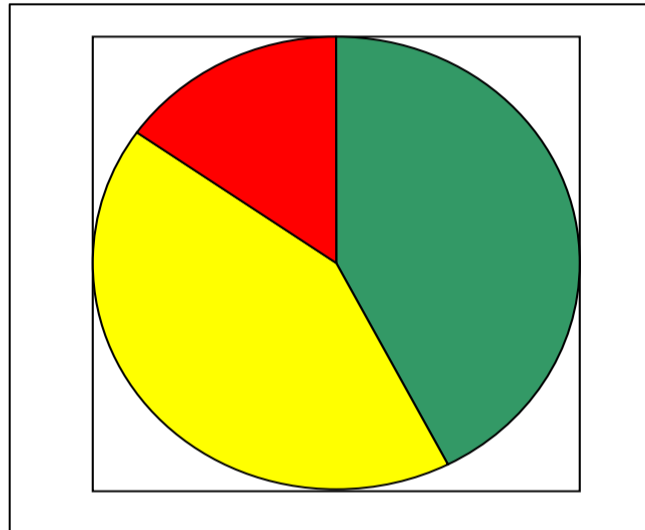
FY03



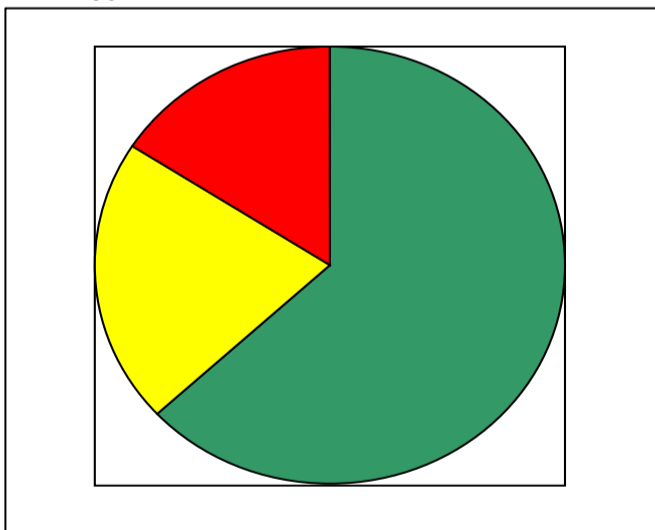
FY04



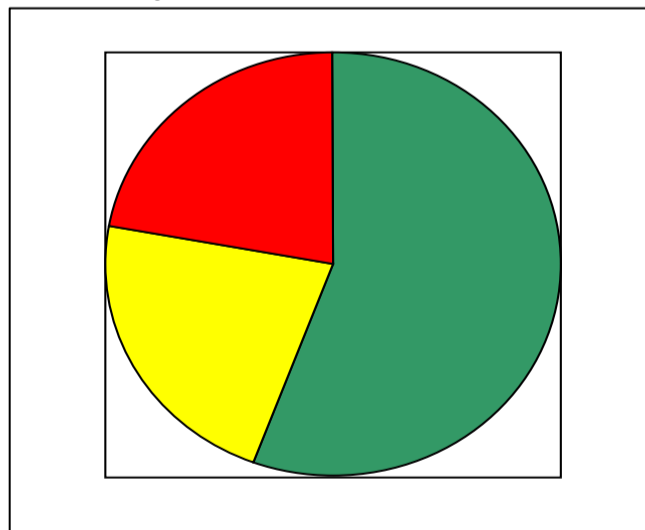
FY05



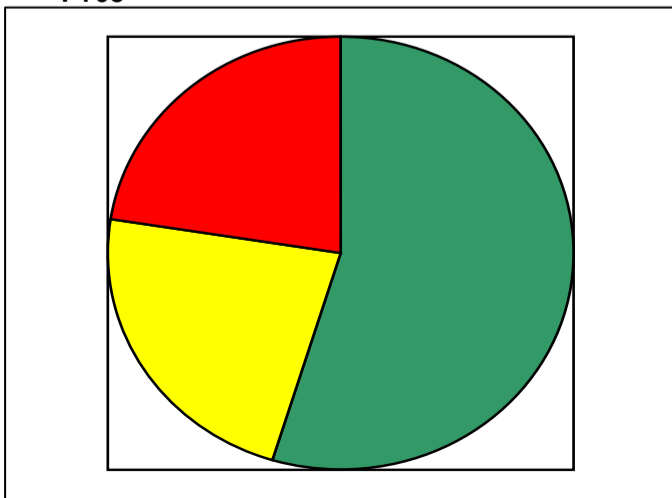
FY06



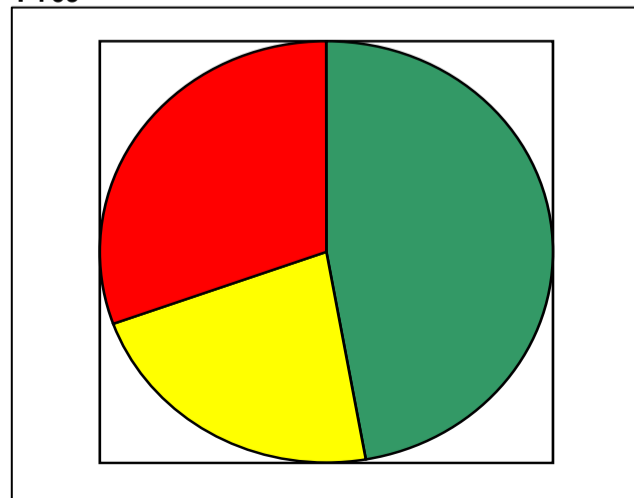
FY07






FY08

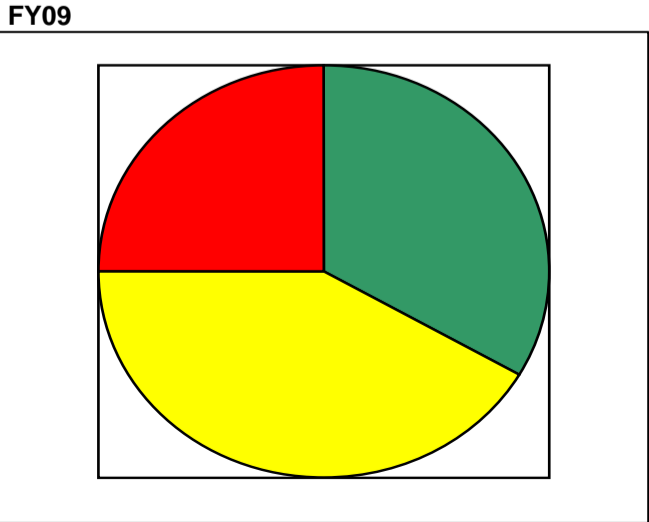
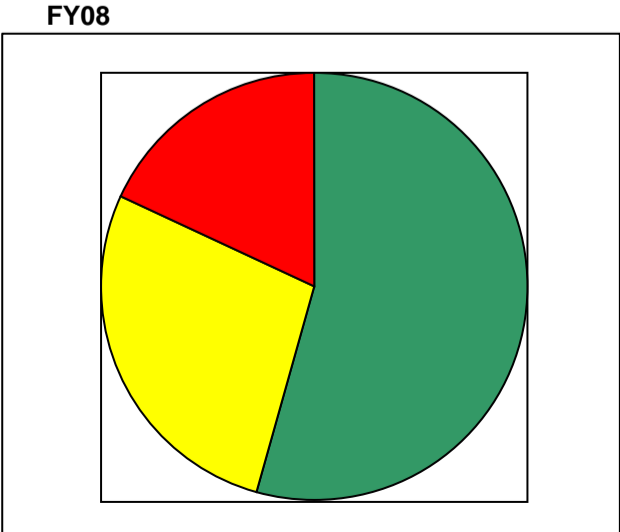
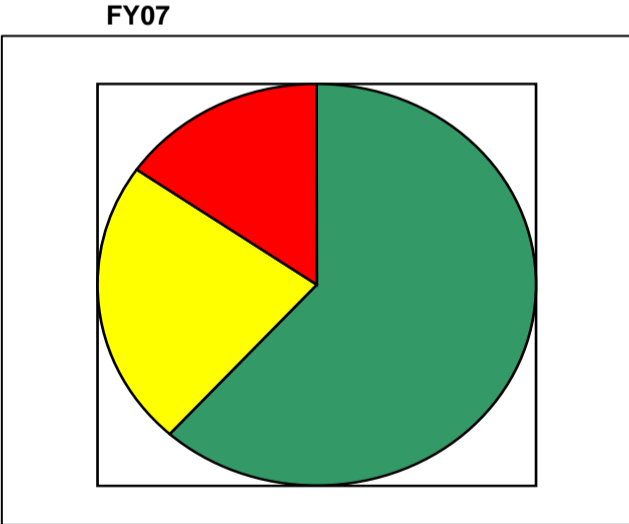
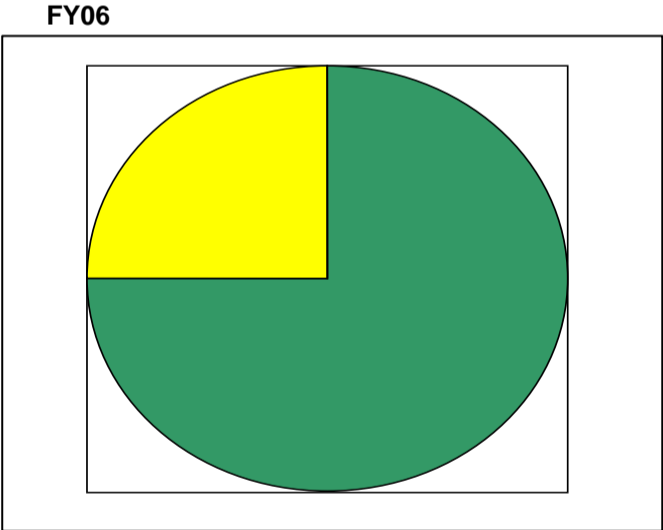
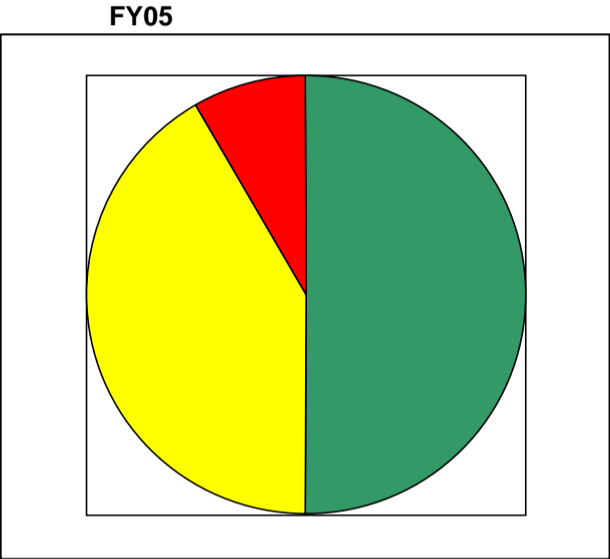
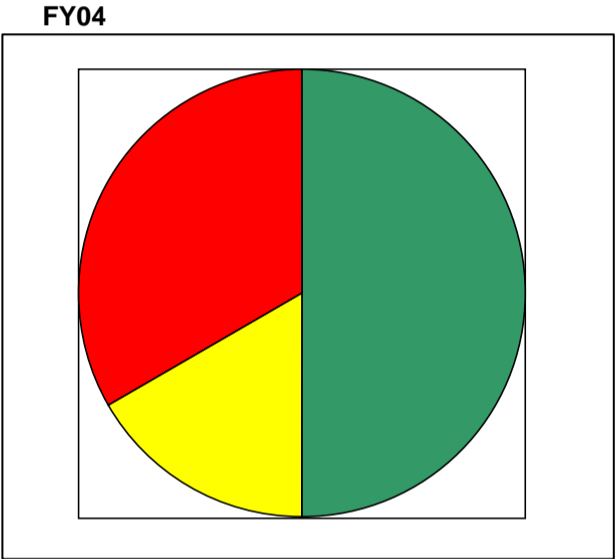
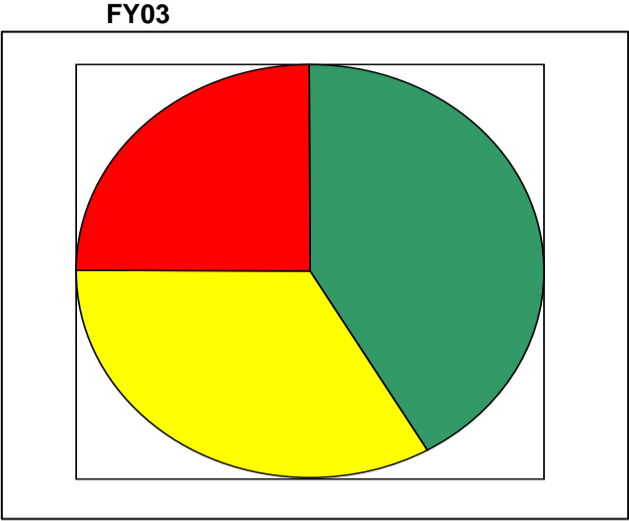
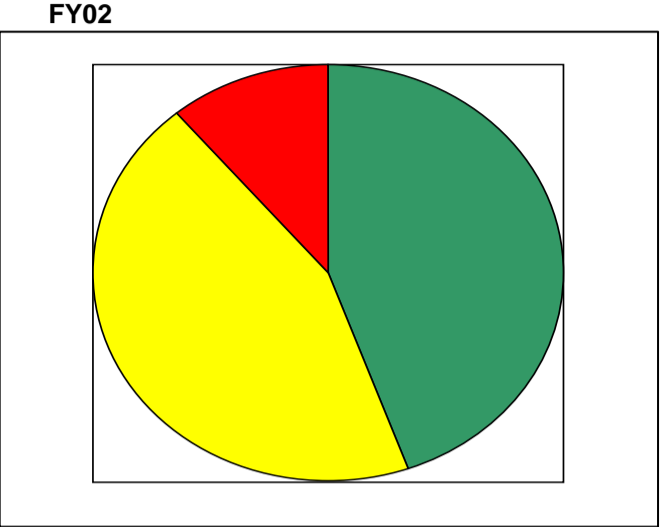


FY09




User Perspective FY2002-2009


 = Target 1  = Target 2  = Target not met



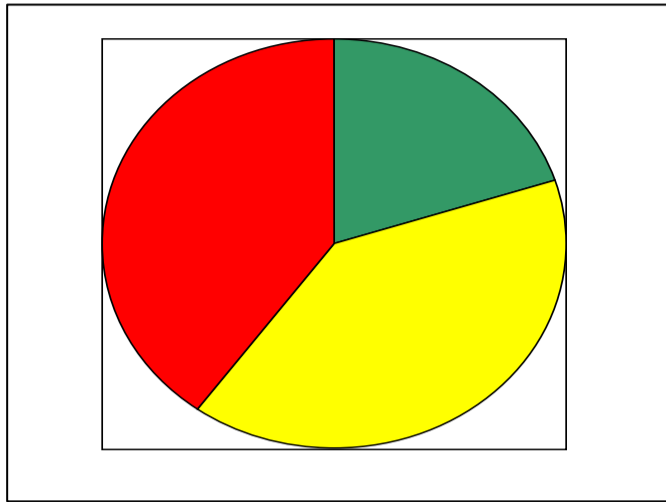
Internal Processes Perspective FY2002-2009

 = Target 1

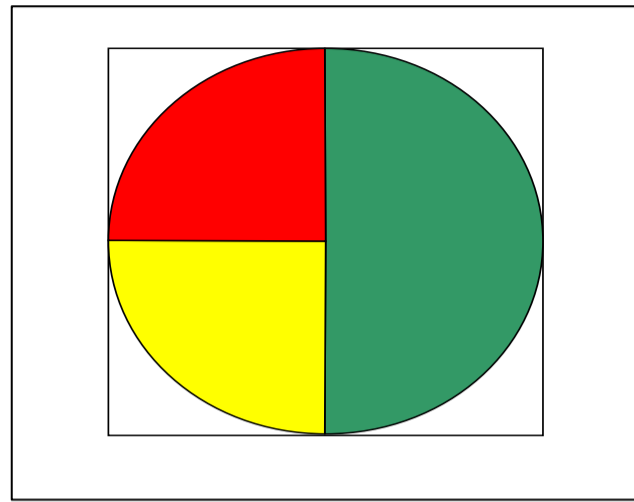
 = Target 2

 = Target not met

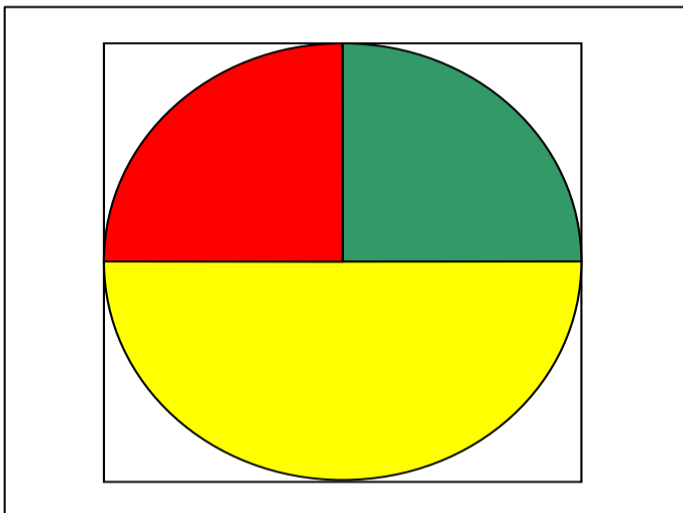
FY02



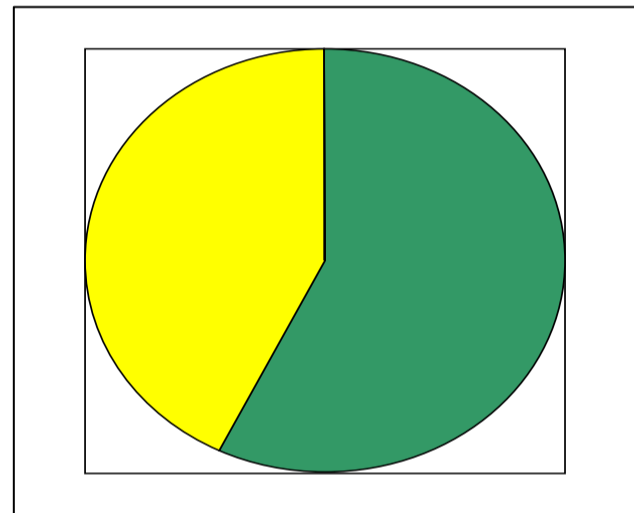
FY03



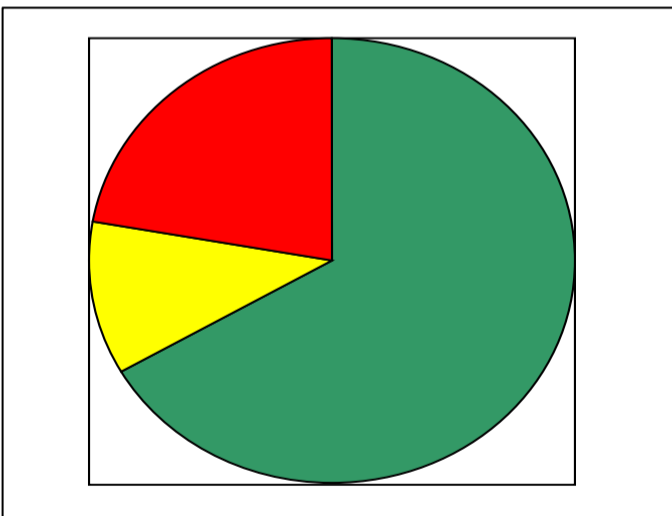
FY04



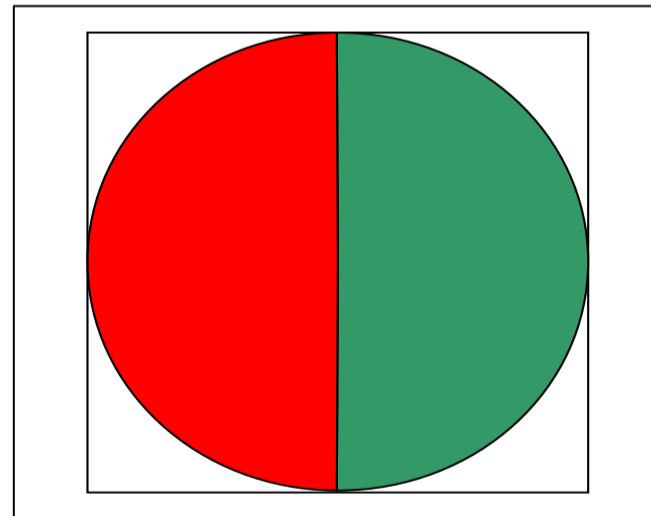
FY05



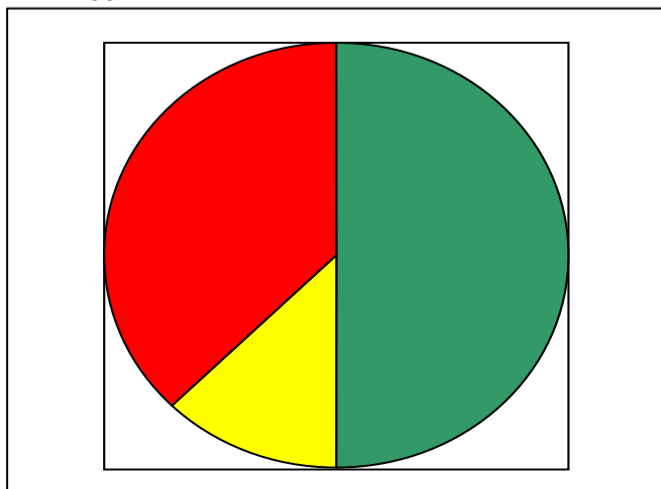
FY06



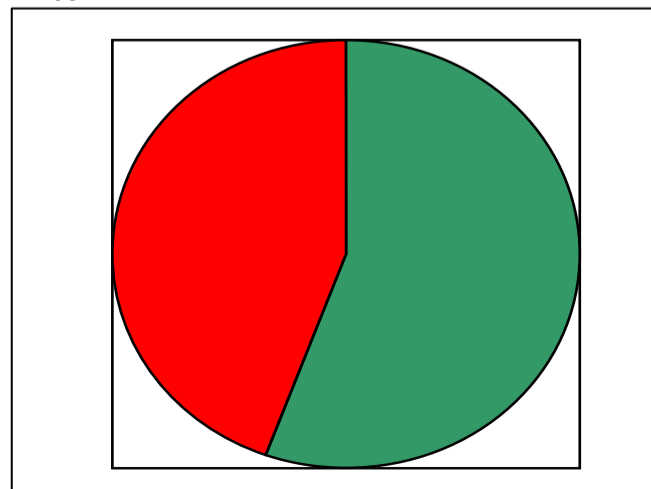
FY07




FY08





FY09



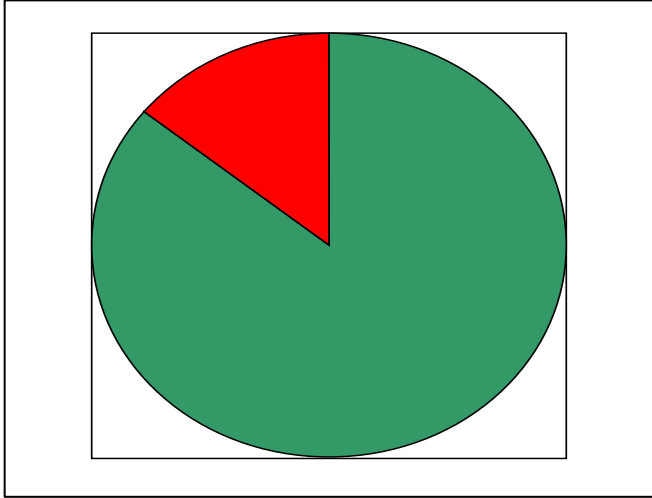
Financial Perspective FY2002-2009

 = Target 1

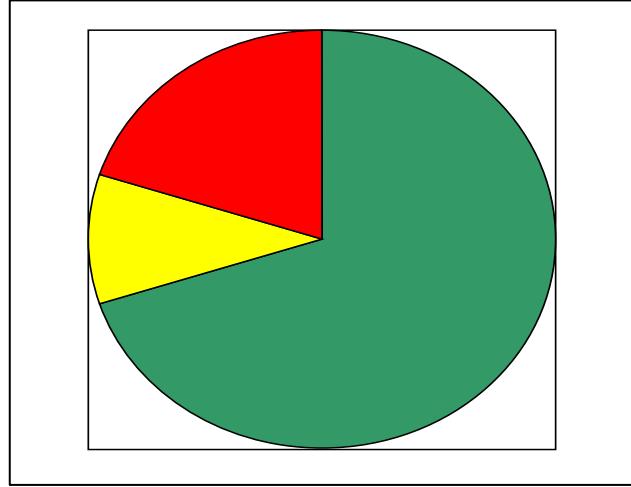
 = Target 2

 = Target not met

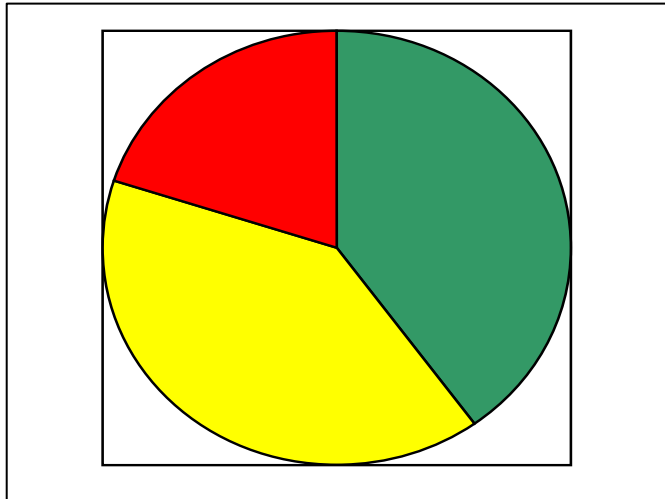
FY02



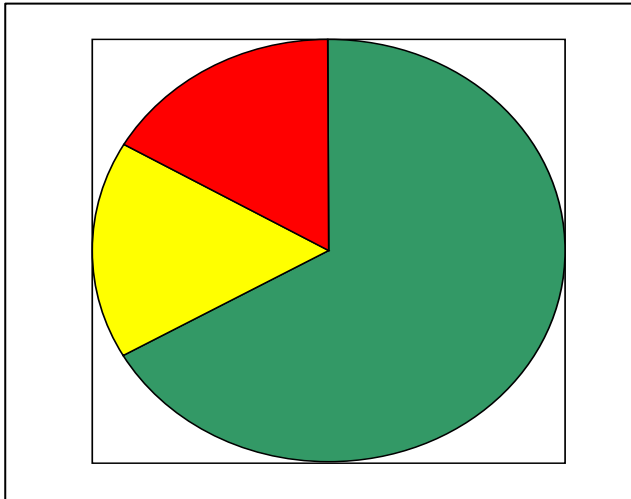
FY03



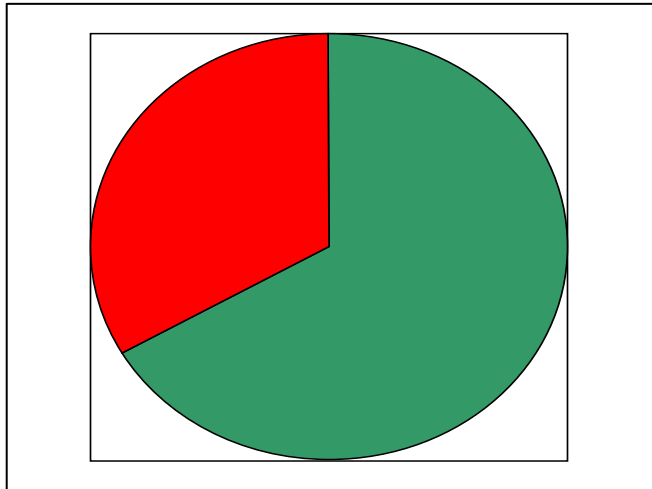
FY04



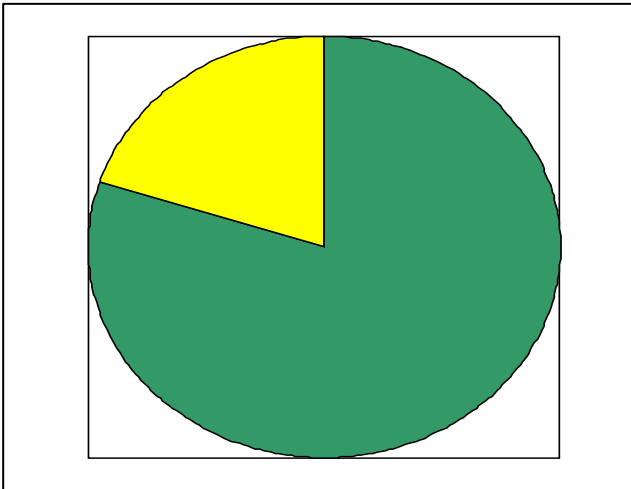
FY05



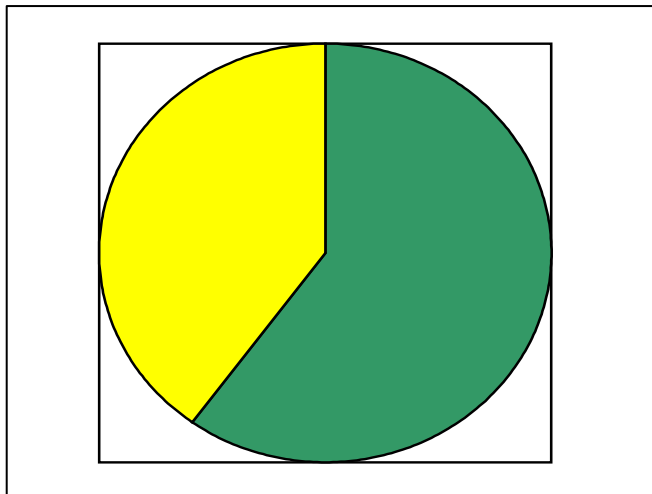
FY06



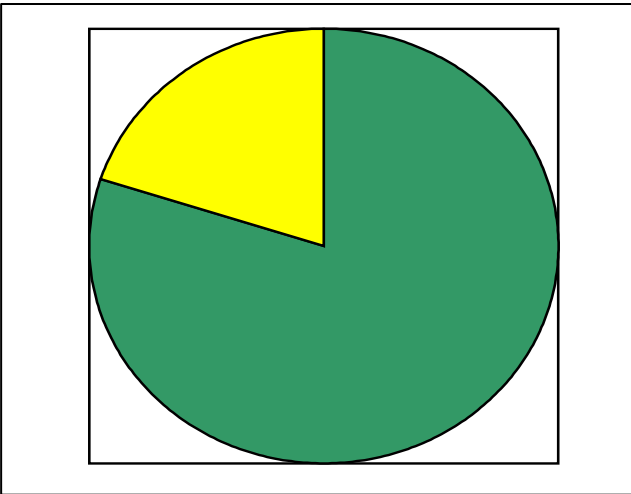
FY07






FY08



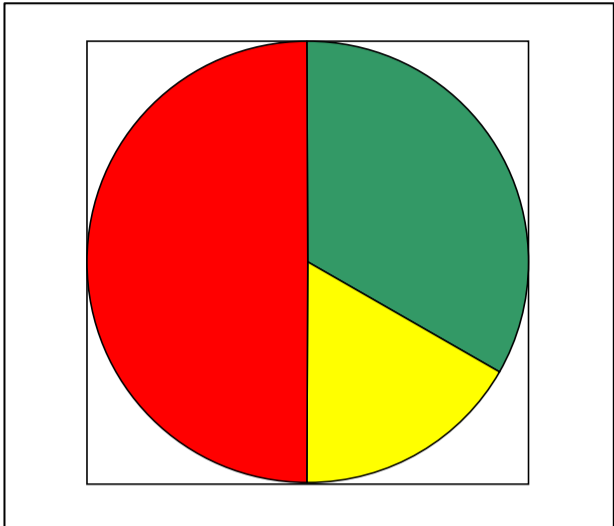
FY09



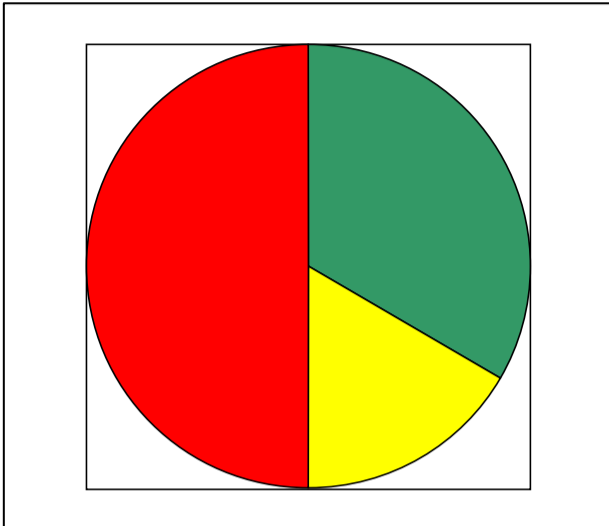
Learning Growth Perspective FY2002-2009

 = Target 1  = Target 2  = Target not met

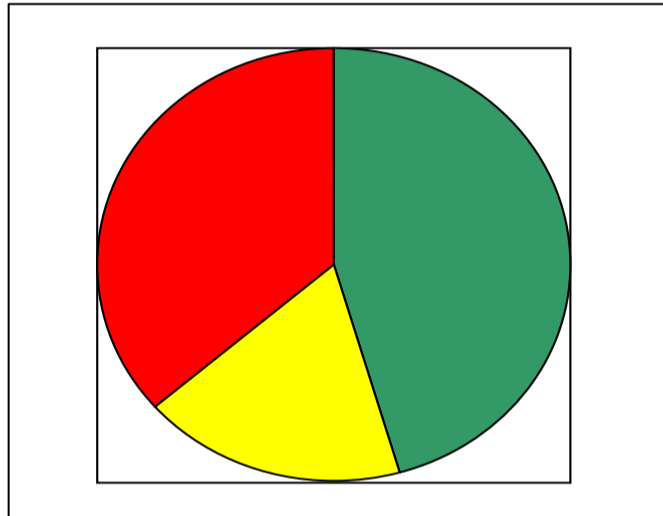
FY02



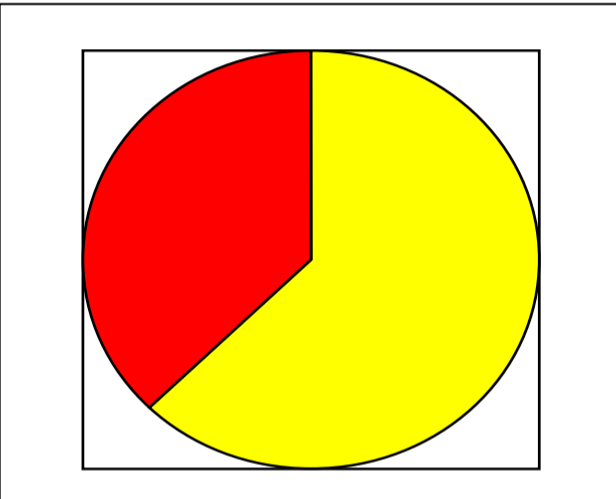
FY03



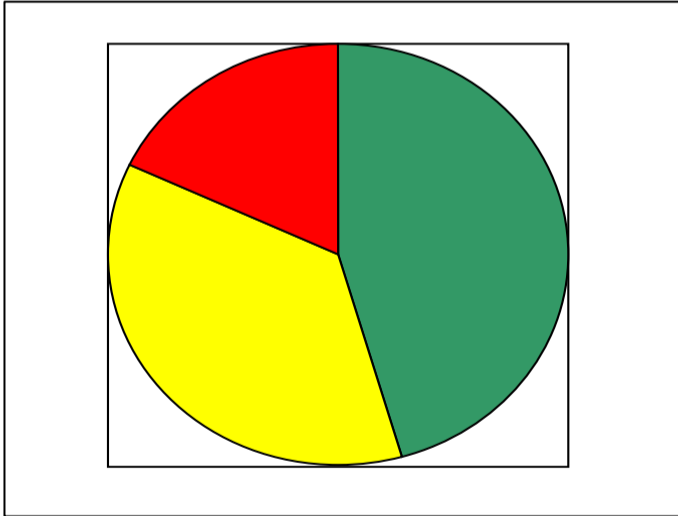
FY04



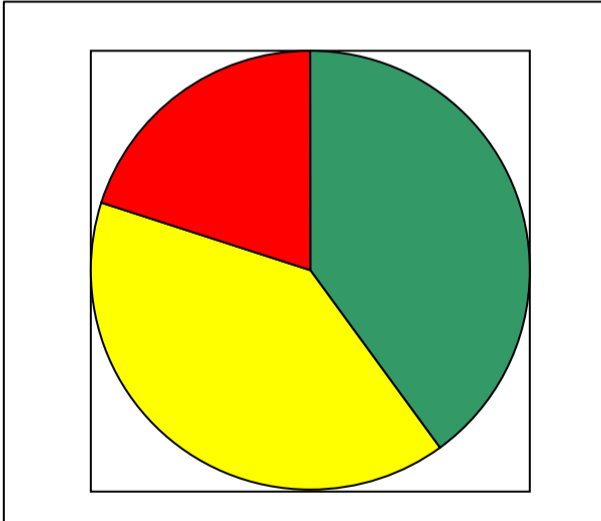
FY05



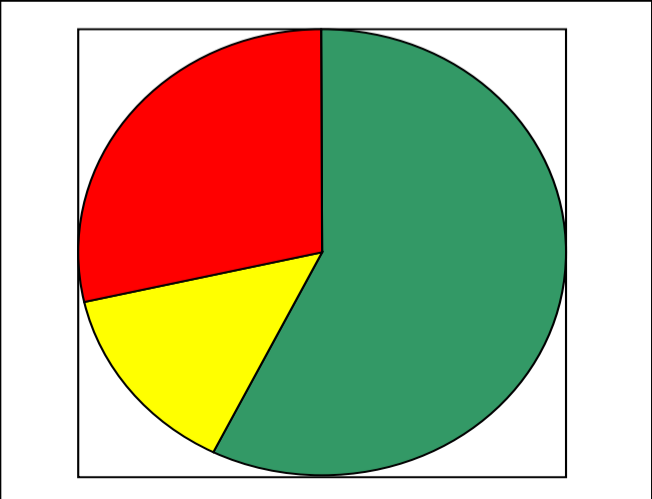
FY06



FY07



FY08



FY09

