

# Developing a Balanced Scorecard for the NIST Information Services Division

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# What I Plan to Address

- Who we are
- Overview of our strategic planning process
- Our 2002 Strategic Plan
- Why we are using a Balanced Scorecard (BSC)
- How we started developing our BSC
- Our Next Steps
- Thoughts to leave you with

# Information Services Division (ISD)

- Research Library & Information Group
- Electronic Information & Publications Group
- Museum & History Program
- Significant interaction among the three groups
- Division's primary customers are the NIST researchers

# Recent Strategic Planning Activities

- Fall 2001 – staff reviewed 1997 Strategic Plan; Mission, Vision, & Values still valid
- Spring 2002 – Technology Services (TS) began strategic planning process
- Summer 2002 – Each division in TS identified 2-3 “Change the Business Objectives” and 2-3 “Run the Business Objectives
- Fall 2002 – Strategic Plans translated into employee performance plans
  - Began development of Balanced Scorecards

# ISD's 2002 Strategic Plan

- Aligned with NIST's 2010 Strategic Plan
- Looks out 3-5 years
- Objectives reflect four areas of Balanced Scorecard – Customers, Operations, Finances, and Learning & Growth
- Measures were identified; no targets were set

# Why We Are Using the Balanced Scorecard

- To meet the increased demands for accountability
- Map progress toward achieving goals (by setting targets for our measures)
- Keep the organization focused on what's important
- Be positioned to align with NIST Balanced Scorecard

# How We Got Started

- All ISD staff attended 2 hour training session given by consultant
- Team of ISD staff participated in 2 hour working session with consultant
- Using work forms provided by consultant, team members developed scorecards for each strategy
- Teams identified themes, measures, and possible targets

# Examples of Measures

- Financial Perspective
  - Ratio of value to cost
  - Expenditures
  - Number of new NIST research initiatives with funding for library resources
- Operations
  - Processing time for acquisitions
  - Number of Lab visits
  - Number of processes improved



# Examples of Measures

- Customers
  - Customer satisfaction
  - Resource usage (circulation, web data)
  - Number of NIST divisions contributing to development of competency profiles
- Learning & Growth
  - Number of staff trained in NIST SFAs
  - Number of staff possessing required competencies
  - Employee satisfaction

# Our Next Steps

- Review (and possibly revise) plan in light of recent significant changes/impacts
- Finalize measures and set targets
- Look at data collection and analysis activities and processes
- Roll-up strategy level scorecards to create one scorecard for the Plan
- Communicate to staff

# Thoughts I Can Leave You With

- Have someone outside your organization guide you through the process, but do the work yourselves
- Involve all levels of the organization in the process
- Don't expect to get it right the first time *and allow plenty of time*
- It's not easy