BOOK REVIEW / CRITIQUE DE LIVRE

Scorecards for results: A guide for developing a library balanced scorecard. By Joseph R. Matthews. Westport, Conn.: Libraries Unlimited, 2008. 112 pages (soft cover). ISBN13 978-1-59158-698-2. US$45.00.

Scorecards for results: A guide for developing a library balanced scorecard is a well-written, clearly organized, and generously illustrated guide on balanced scorecards and their implementation in the library sector. This book is authored by evaluation expert Joseph R. Matthews and includes a foreword from Robert Kaplan and David Norton, who are widely credited for popularizing the balanced scorecard management tool. The development of Matthew's work was funded by an Institute of Museum and Library Services National Leadership Grant and tested on four public libraries in southern California over a 1-year period.

Matthews' book is divided into two parts: several introductory chapters, which provide readers with an overview of the subject, followed by chapters detailing the balanced scorecard's six-step process. The introduction outlines the general evaluation model and defines its components: input, process, output, and outcome measures. Chapter 1, "What is a balanced scorecard?", provides an introduction to basic management concepts, such as strategic planning, performance measures, culture of assessment, organizational change, planning process, and the balanced scorecard. The four perspectives that comprise the balanced scorecard — financial, customer, internal business process, and learning and growth — are also outlined. The author uses a bottom-up, cause-and-effect diagram to illustrate the relationships among the four perspectives. A brief list of institutions that have chosen to use the balanced scorecard demonstrates its widespread use. In chapter 2, "The library scorecard", diagrams illustrate how the four perspectives are linked to the organization's mission, processes, resources, and services. In addition, chapter 3, "A suggested process", offers a short overview of the implementation of the balanced scorecard process.

The six-step process of the balanced scorecard approach is outlined in chapters 4 through 9. Beginning with step 1, "The mission and vision", chapter 4 contains detailed instructions for writing effective mission and vision statements while providing examples from many different types of organizations, public and private sector alike. "Strategy and strategy maps", step 2, is discussed in chapter 5. Three broad strategies are covered in this chapter: operational excellence, customer intimacy, and innovative services. A strategy is not a programmatic goal or objective; a strategy is a plan of action for achieving one goal. Overall, strategies help the organization to realize its vision. "Selecting performance measures", step 3, is the focus of chapter 6. Within this chapter, each perspective is operationalized by three to five measures that match the vision, mission, and goals of the organization. Matthews maintains that these measures can be developed internally or selected from pre-existing measures created by other organizations. A very detailed list

of possible performance measures is provided in Table 6.3. As well, a comprehensive list of criteria for the selection of performance measures is presented. In chapter 7, step 4, "Identifying targets and initiatives", Matthews identifies several types of targets while stressing the importance of setting targets. Identifying and prioritizing initiatives (projects) is key to reaching targets. According to Matthews, reaching set targets entails creating a list of initiatives, assigning staff and resources, and meeting the timeline for completion. Chapter 8, step 5, "Integrating the scorecard", describes how the balanced scorecard approach can be embedded within the organization. Cascading the scorecard, as described by Matthews, requires the development of scorecards at different levels — individuals and teams, branches and departments, and the overall library. The author recommends that managerial and departmental meetings include discussion of the measures, implementation problems, and overall progress in reaching set targets. Possible implementation challenges are also detailed. This chapter concludes with a useful table that lists key success factors for change in relation to questions library staff and directors should ask themselves in order to accomplish set goals. Lastly, chapter 9 details the final step in the balanced scorecard process, "Communicating your scorecard". How best to present the library's balanced scorecard to stakeholders is the focus of this chapter. Matthews explains that skilful communication about the library's balanced scorecard is crucial to its success. Using meetings, events, or effectively written Web pages and brochures that include diagrams can help successfully communicate the library's balanced scorecard.

The primary strengths of this book are its clarity and brevity. Nine succinct chapters, replete with tables, charts, diagrams, and resources, guide readers through the balanced scorecard process. One example of the author's clear and concise writing style is the list of five important questions, in bulleted text, found at the beginning of chapter 3:

(1) Why? Why does the organization exist?
(2) Where? Where is the organization headed (the vision thing!)?
(3) Who? Who are its customers?
(4) What? What are its product and service offerings?
(5) How? How will the organization create and deliver its products and services (the strategies to be employed)?

Although the content is derived primarily from well-respected journals in the fields of both library science and management, including *Library Journal*, *Library Trends*, *Performance Measurement and Matrices*, *Harvard Business Review*, and *Management Decision*, this is not a dry academic text, but a detailed step-by-step guide. Relevant terms are defined in a glossary. A list of readings at the end of each chapter and an appendix of selected resources at the book's conclusion offer rich contextual information by referencing case studies on the adoption and implementation of the balanced scorecard approach in the library sector.

This work does have one noticeable shortcoming; the successes and failures experienced by the four public libraries in southern California that served as test sites for the adoption and implementation of the balanced scorecard approach are not detailed. The inclusion of this information would undoubtedly be useful to those who are thinking of adopting the balanced scorecard approach so they may avoid any pitfalls encountered by these libraries. However, the underlying assumption seems to be that readers should consult the articles listed at the end of each chapter and the appendix to gain deeper insight into the implementation of the balanced scorecard approach.

Scorecards for results: A guide for developing a library balanced scorecard provides a good overview of the balanced scorecard approach to quality control in the library sector. Library managers concerned with monitoring performance, both in the short-term and the long-term, and those who are interested in comparing the performance of their library to others, will find this book to be a practical guide. JCHLA readers, primarily librarians working in health care institutions, would benefit from learning how the balanced scorecard is implemented in the health care sector. Books on health care administration and management that focus on quality management tools, such as *Performance Management in Healthcare* (2006) by Jan Wallburg, may offer some insights on the effective use of balanced scorecards in the broader health care sector.

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