



Strategic Plan 2016-2019

Implementation, Compliance and Progress

Strategic Plan Performance Measures Committee

June 29, 2016

Boardroom, Toronto Reference Library



Mandate of the Strategic Plan Performance Measures Committee:

“To provide advice and recommendations to the Board for strengthening the Board’s monitoring and assessment of the Strategic Plan’s implementation for compliance and progress.”

Approved by Library Board, December 2015 - June 2016:

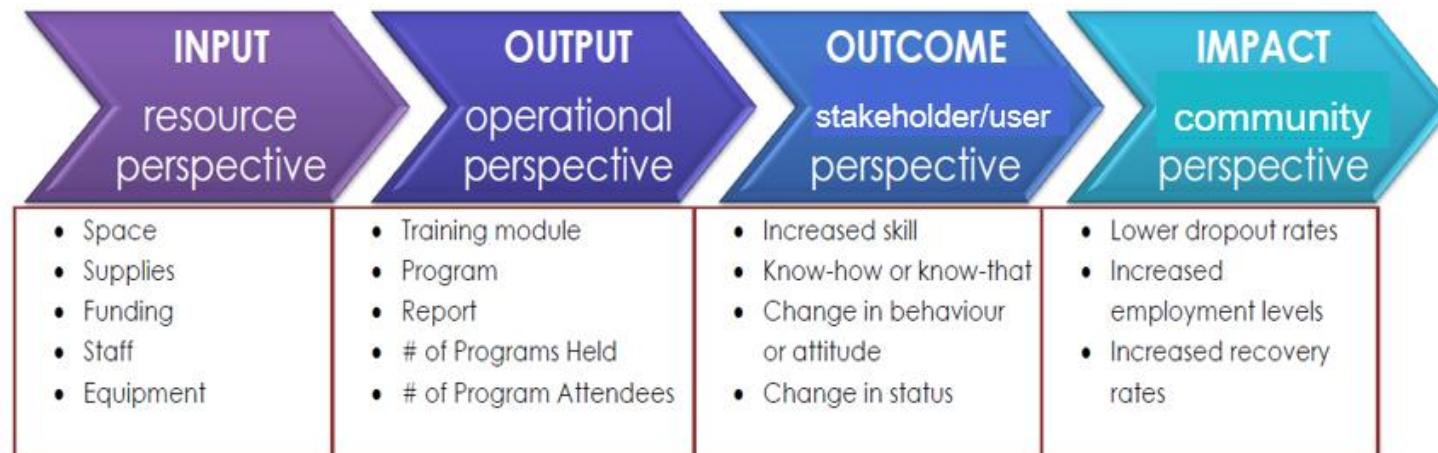
- Strategic Plan priorities
- Key public-facing messages, including broad outcome statements
- 2016 work plan activities and indicators
- Status update on work plan activities

Focus now is on finalizing tools and indicators to measure the outcomes and impact of the Strategic Plan.

Balanced Scorecard: A performance measurement tool developed in 1992 by Harvard Business School professor Robert S. Kaplan and management consultant David P. Norton. The balanced scorecard provides a framework for managers to use in **linking different types of measurement together**. Kaplan and Norton recommend looking at the business from four perspectives: the **customer's perspective**, an **internal business perspective**, an **innovation and learning perspective**, and the **financial perspective**.

Balance scorecard. Encyclopedia of Business. Gale. 2000.

Logic Model: used in program development, implementation and evaluation; shows the if/then (causal) relationship between the elements of a program.



Adapted from *Measuring What Matters: A Library/LRC Outcomes Assessment Manual*
by Bonnie Gratch Lindauer, Learning Resources Association, 2000

Theory of Change: A theory of change explains how to produce desired outcomes. It is explanatory. A logic model just has to be sequential (inputs before activities, activities before outcomes), logical, and reasonable. In contrast, a theory of change must explain why the activities produce the outcomes.

Patton, M.Q. (2014). *Evaluation Flash Cards. Embedding Evaluative Thinking in Organizational Culture*. St. Paul, Minnesota. Otto Bremer Foundation. http://www.ottobremer.org/sites/default/files/factsheets/OBF_flashcards_201402.pdf

Collective Impact: The commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem, using a structured form of collaboration.

Kania, J. and Kramer, M. (2011). Collective Impact. *Stanford Social Innovation Review*. [online] Available at: http://www.ssireview.org/articles/entry/collective_impact

Inputs are resources dedicated to achieving program outcomes and are used in the delivery of a service.

Outputs are the direct products of program activities, usually measured in terms of the volume of work accomplished.

Outcomes are the benefits or changes for participants (or communities) during or after their involvement with a program or service.

United Way of Greater Toronto. (2004) *A Toolkit for Outcome Measurement*. Toronto.
<http://www.fusionyouthcentre.ca/corporate/images/impact/resources/United%20Way%20Toronto%20Outcome%20Measurement%20Toolkit.pdf>

Impact is what nonprofit organizations and the funders who support them seek to achieve – making real differences in the world.

Brest, P. (2010). "The Power of Theories of Change". Standford Social Innovation Review. Spring.
<http://sc4ccm.jsi.com/files/2012/10/The-Power-Of-Theories-Of-Change.pdf>

Indicators are specific items of information that track a program's success.

Outcome Measurement is a process of regular monitoring of the results of a program for its participants or organization against agreed-upon goals and objectives.

United Way of Greater Toronto. (2004) *A Toolkit for Outcome Measurement*. Toronto.
<http://www.fusionyouthcentre.ca/corporate/images/impact/resources/United%20Way%20Toronto%20Outcome%20Measurement%20Toolkit.pdf>

Baseline: Information that is used as a starting point by which to compare other information.

baseline. 2016. in *Merriam-Webster.com*. Retrieved June 21, 2016, from <http://www.merriam-webster.com/dictionary/baseline>

Benchmark: A point of reference from which measurements may be made. Something that serves as a standard by which others may be measured or judged.

benchmark. 2016. in *Merriam-Webster.com*. Retrieved June 21, 2016, from <http://www.merriam-webster.com/dictionary/benchmark>

Discussion

Strategic Plan Balanced Scorecard

Strategic Plan Balanced Scorecard:

- Context of TPL's overachieving KPI's performance
- A strategic planning and monitoring tool for reporting on actual results, 2016-2019
- Results are analyzed from four perspectives
- Will include overarching KPIs at the system level and Strategic Plan indicators

Financial Perspective

Sample Overarching KPIs:

- Total direct operating expenditures
- Total direct operating expenditures, \$ per capita
- Estimated \$ value of State of Good Repair backlog
- Total revenues from all sources

Strategic Plan Balanced Scorecard

Financial Perspective

Sample Strategic Plan Indicators:

- Total operating expenditures by dedicated strategy (e.g. Youth Hubs, WiFi Hotspot Lending program)
- Total revenues linked to dedicated strategies
- New funding from public/private partners for strategic initiatives
- **Value** of increased access, opportunity and connections made through the Library to the City of Toronto as a whole beginning with digital services
 - Measured through an updated Economic Impact Study

Strategic Plan Balanced Scorecard

Operational Perspective

Sample Overarching KPIs:

- Total # of access points
- Total # of open hours
- Total # of circulating holdings
- Total # of reference holdings

Strategic Plan Balanced Scorecard

Operational Perspective

Sample Strategic Plan Indicators:

- # of new open hours on Sunday and through new models
- # of library visits increased at branches with new hours
- # of top-level strategic partners TPL engages with in the delivery of programs/services under each dedicated strategy
- Alignment of new and existing partnerships to City and TPL strategic goals and activities
- Economic value of expanded open hours

Strategic Plan Balanced Scorecard

Customer Perspective

Sample Overarching KPIs:

- Total number of active cardholders
- Active cardholders per capita
- Total circulation
- Total circulation per capita
- Average number of times in a year circulating items are borrowed (turnover)

Strategic Plan Balanced Scorecard

Customer Perspective

Sample Strategic Plan Indicators:

- # of active memberships in NIA branches
- % users reporting that Library technology, collections and service are convenient and easy to use
- % of residents reporting that TPL technology, training and learning experiences helped them to advance educational, employment and personal goals
- % of residents reporting that a connection to an experience, person or community made through the Library was valuable to them

Strategic Plan Balanced Scorecard

Learning and Growth Perspective

Sample KPIs:

- Total FTE staff per 100,000 population
- Total FTE librarians per 100,000 population
- Total training hours / # of FTE staff

Strategic Plan Balanced Scorecard

Learning and Growth Perspective

Sample Strategic Plan Indicators:

- New staff roles and training to advance strategic initiatives
- % of staff who report high levels of engagement and have the knowledge and training to meet public service outcomes
- % of users who rate staff as knowledgeable and helpful

Strategic Plan Balanced Scorecard

- **Balanced Scorecard** will report:
 - KPIs at the system level
 - Strategic Plan indicators
- **Strategic Plan Dashboard** presents highlights of strategic plan achievement, drawn from the Balanced Scorecard.

Strategic Plan Dashboard

Board Report | Strategic Plan 2016 Dashboard | Sample Template

Attachment 3

ACCESS

OPPORTUNITY

CONNECTIONS



The Outcome:

- ▶ Easy, local, convenient access
- ▶ To a broad range of library collections and services
- ▶ Where, when and how Torontonians of all ages need and want them
- ▶ And an exceptional customer experience at every point of need.

Improved Access Key Indicators



OPEN HOURS



BARRIER-FREE MEMBERSHIP



MOBILE & ONLINE
TRANSACTION SERVICE OPTIONS

Strategic Plan Dashboard

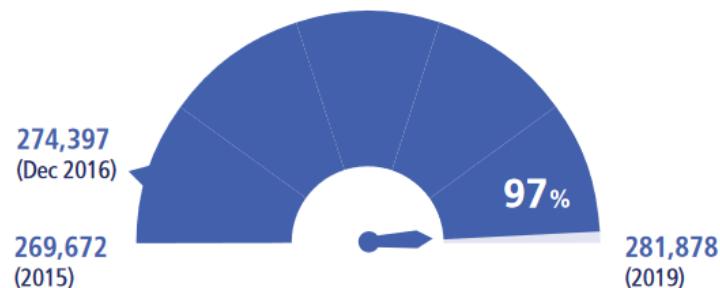
Board Report | Strategic Plan 2016 Dashboard | Sample Template

ACCESS

OPPORTUNITY

CONNECTIONS

Open Hours



2016 activities that moved the dial	Status
Sunday service expanded to create year-round service at six District and two R & R branches, and added to 6 neighbourhood branches to provide seasonal Sunday service	G

Measure	Baseline (2015)	Current (2016)	Target (2019)*	% of Target Achieved
Total # of open hours	269,672 hours	274,397 hours	281,878 hours	97%

*Contributors to target open hours

- ▶ 2016: Sunday service hours expansion
- ▶ 2017: Sunday service hours expansion (year-round service at five additional district branches)
 - Youth Hubs hours expansion
 - After hours card access
- ▶ 2018: Sunday service hours expansion (year-round service at five additional district branches)
 - Youth Hubs hours expansion
 - After hours card access
- ▶ 2019: Youth Hubs hours expansion
 - After hours card access

Strategic Plan Dashboard

Board Report | Strategic Plan 2016 Dashboard | Sample Template

ACCESS

OPPORTUNITY

CONNECTIONS

Barrier-Free Membership



2016 activities that moved the dial	Status
Library's policy on fines and fees reviewed to support equity and inclusion	G
Marketing strategy to promote children's membership, with targeted outreach in TSNS 2020 neighbourhoods to achieve targets and outcomes	G

Measure	Baseline (2015)	Current (May 2016)	Target (2019)	% of Target Achieved
# active memberships in NIAs	182,142	180,455		

Strategic Plan Dashboard

Board Report | Strategic Plan 2016 Dashboard | Sample Template

ACCESS

OPPORTUNITY

CONNECTIONS

Mobile and Online Transaction Service Options



2016 activities that moved the dial	Status
Digital Strategy developed and endorsed by the Board to create an excellent, integrated customer service experience online and in library branches	G
Policy review supports the delivery of digital services	Y
New user-centred online services launched for 2016	
Online fines payment improvements	G
More mobile friendly web pages	G
Online registration	Y
Your Account	G
Children's online presence	G

Measure	Baseline (2015)	Current (2016)	Target (2019)	% of Target Achieved

Strategic Plan Dashboard

Discussion

- Refine balanced scorecard KPIs and Strategic Plan indicators based on feedback
- Develop annual targets
- Develop logic models for Strategic Plan key areas, beginning with digital services
- Align and track additional indicators for City strategies as they are developed



Thank You

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