

## Strategic Plan Execution Roadmap and 2021 Action Plan

<b>Date:</b>	January 25, 2021
<b>To:</b>	Toronto Public Library Board
<b>From:</b>	City Librarian

### SUMMARY

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The purpose of this report is to provide an overview of how Toronto Public Library (TPL) plans to achieve the outcomes of its strategic plan over the next four years.

TPL's strategic plan execution roadmap and action plan provides all stakeholders, including the Board and TPL staff, a shared way to understand the organization's plans and to monitor its progress.

The strategic plan execution roadmap moves the Library forward on almost all of the plan's strategic priorities and enablers from the beginning, with the first two years of the roadmap balancing the need to build foundations – such as a customer experience strategy – with the delivery of immediate needs such as a new incident management system and processes. Years three and four are directional at this time and will be defined in detailed action plans as part of TPL's annual business planning.

For TPL to achieve the expected outcomes of its 2020-2024 Strategic Plan, the entire organization must understand what will be required – year by year – and how each individual's role contributes to the overall success of the plan. Aligning the entire organization to the strategic plan execution roadmap will be achieved through annual scorecards and ongoing communication. Staff will bring updates on progress and plans to the Board semi-annually, as part of the balanced scorecard review.

### FINANCIAL IMPACT

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The strategic plan, including the 2021 Action Plan, is funded by TPL's operating and capital budgets, and the City staff recommended TPL 2021 budgets are currently under review at the City. Future actions that may be identified for implementation in future

years to support the strategic plan will be included in budget submissions for those years.

The Director, Finance & Treasurer has reviewed this financial impact statement and agrees with it.

## **DECISION HISTORY**

At its November 25, 2019 meeting, the Library Board approved the 2020-2024 Strategic Plan Overview as recommended by the Strategic Planning Steering Committee.

<https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2020/feb24/14-2020-2024-strat-plan-strategy-map-and-balanced-scorecard-combined-revised.pdf>

At its June 22, 2020 meeting, the Library Board received a report for information which provided an overview of the findings from staff's COVID-19 impact analysis on the plan's five priorities and enablers. <https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2020/jun22/20-strategic-plan-2020-2024-covid19-comms-plan-update-combined.pdf>

## **BACKGROUND**

TPL's 2020-2024 Strategic Plan "TPL: Vital to Toronto" was completed in 2019. It was a collaborative effort over a year-long process that engaged over 4,000 individuals including library staff and customers, Torontonians, community partners and other stakeholders about what the library can do to support them and their communities now and into the future.

The strategic plan outlines what TPL intends to achieve, what success will look like, and offers examples of how these goals will be achieved.

With this clear understanding of where TPL is headed, staff have been working to define a plan for *how* to get there, year by year; a strategic plan execution roadmap and yearly action plans.

Planning work began in November 2019 and by February 2020, staff had established a common understanding of the projects and priorities both underway and ready to begin, to support the strategic priorities.

In March 2020, the COVID-19 pandemic took hold of the city and TPL staff quickly shifted attention and efforts towards closing branches, deploying staff to work remotely where possible, and to building capability to rapidly offer new and existing

library services online. Through partnerships, TPL provided community supports to address the city's highest needs and serve its most vulnerable populations as the pandemic disproportionately impacted those individuals.

In May 2020, TPL assessed the impact of COVID-19 on its strategic plan. The findings strongly affirmed TPL's strategic direction and highlighted the importance of the five priorities and three enablers in creating capacity to build success, resilience and well-being for the city and its communities. Results of this analysis inform this execution roadmap.

By June 2020, there was a heightened need to reflect on and incorporate recent experiences into strategy execution planning work. The following questions were considered:

- What has TPL learned in the past few months that should be applied to the strategy?
- How should TPL realize its strategic priorities?
- What specific actions are required to bring the strategic plan to life?
- Are there any identified gaps or concerns impeding the achievement of TPL's ambitions? How can these be mitigated?

Between June and October 2020, through a series of facilitated workshops, staff focused on these topics, the output of which forms the strategic plan execution roadmap.

### **Planning Methodology used:**

#### 1. Brainstorming

Staff started by considering how each strategic priority could be achieved, whether it be through work underway, incremental improvements, or new, innovative ideas. Each idea was further enhanced and refined before choosing those believed to have the most impact.

#### 2. Organizing of ideas into programs

Related ideas were grouped together. Each grouping of ideas to achieve strategic priorities were classified as "programs", below:

### **Strategic Priority 1: Opening up our public space**

1.1 Create and implement the Spaces as a Service program.

1.2 Develop and implement a facilities sustainability strategy, roadmap and action plan.

1.3 Reimagine Tier 4 of the Service Delivery Model.

**Strategic Priority 2: Broadening digital access, literacy, and inclusion**

2.1 Develop and implement a strategy, roadmap and action plan for access to technology and digital literacy.

**Strategic Priority 3: Building pathways for workforce and life skills development**

3.1 Develop and implement a strategy, roadmap and action plan to support workforce development.

**Strategic Priority 4: Providing the vital ingredients for a democratic society**

4.1 Develop and implement an advocacy strategy, roadmap, policy and action plan.

4.2 Develop and implement an equity strategy, roadmap and action plan.

**Strategic Priority 5: Investing in staff and an innovative culture**

5.1 Modernize the employee experience.

5.2 Adopt a modern workplace.

5.3 Foster a discrimination-free workforce.

5.4 Develop and implement a holistic employee health, safety and wellness strategy, roadmap and action plan.

**Strategic Enablers: Partnerships, Modernization and Accountability**

6.1 Develop and implement a partnership strategy, roadmap and action plan.

6.2 Modernize TPL's brand promise and visual identity.

6.3 Modernize the customer experience.

6.4 Develop and implement a digital strategy, roadmap and action plan.

6.5 Strengthen organizational evaluation and accountability practices.

3. Developing each program

Staff discussed and defined each program's objectives, key activities and projects, dependencies, stakeholders, risks, and timeframes.

4. Dependencies and capacity

The programs and their component activities and dependencies were plotted over four years, identifying the scope and pace of our plans.

## COMMENTS

TPL's strategic plan execution roadmap moves forward on almost all of the plan's strategic priorities and enablers from the beginning:

- 2020 was primarily focused on planning, prioritization and implementing critical projects. COVID-19 resulted in a delay in strategic execution but enabled thought about what work will be needed to achieve the strategic plan;
- 2021 is balanced between thinking and planning work (developing specific strategies, taking inventories, and mapping out multi-year programs and their activities), and completing strategically important and immediately-needed projects; and
- 2022-2024 priorities build on the direction and foundations set in the first two years. Specific initiatives for these years will be determined by the planning work done in-year.

### **Pandemic Response and Recovery**

The strategic plan execution roadmap and action plans have been developed, and will be implemented and managed, within the context of TPL's ongoing COVID-19 pandemic response and recovery planning and operations.

### **Strategic Priority 1: Opening up our public spaces**

2021

- Build and begin executing a multi-year AODA action plan for TPL's services and spaces to reach and maintain compliance.
- Deliver the Incident Management system (project started in 2020).
- Develop a strategy, roadmap and action plan for TPL's digital spaces and services and begin to execute on it.

2022

- Continue the implementation of AODA projects.
- Develop and implement new initiatives as part of the "Spaces as a Service" program.
- Define and initiate new projects from the Reimagine Tier 4 of the Service Delivery Model program.
- Develop a facilities sustainability strategy, roadmap and action plan, including a smart-buildings program.

2023-2024

- Complete AODA projects.
- Complete Reimagine Tier 4 of the Service Delivery Model program.

- Develop and implement a smart-buildings program and other initiatives from the facilities strategy action plan.

### **Strategic Priority 2: Broadening digital access, literacy, and inclusion**

2021

- Develop a strategy, roadmap and action plan that builds on existing services and programs to broaden access to technology and digital literacy, including service definition and reporting.

2022-2024

- Execute action plan developed in 2021.
- Formalize core digital literacy programs and services for all age levels and target audiences with evaluation framework.
- Develop and resource emerging technology initiatives for existing and new services.

### **Strategic Priority 3: Building pathways for workforce and life skills development**

2022-2024

- Develop a strategy, roadmap and action plan and introduce programs and initiatives for workforce and life skills development.

### **Strategic Priority 4: Providing the vital ingredients for a democratic society**

2021

- Develop an advocacy strategy, roadmap, policy and action plan to advance public library service.
- Develop an equity strategy, roadmap and action plan to understand and address barriers to library services for vulnerable people and equity-seeking groups to achieve equitable outcomes.

2022-2024

- Resource and introduce programs and initiatives defined in the strategy roadmaps and action plans.

### **Strategic Priority 5: Investing in staff and an innovative culture**

2021

- Develop the employee experience plan, integrated with a modern workplace plan, and identify priorities.
- Develop and execute a workplace reentry plan and remote work strategy, roadmap and action plan.
- Develop and begin to execute the plan to optimize staff productivity, collaboration & communication (O365, Sharepoint, Access).
- Advance workplace policy initiatives encompassing anti-Black racism and broader equity and inclusion.

2022-2024

- Continue to optimize staff productivity, collaboration, and communication.
- Resource and complete programs defined in employee experience plan, employee health, safety and wellness plans, and remote work strategy.
- Initiate and complete HR modernization projects.

### **Strategic Enabler: Partnerships**

2022-2024

- Develop and implement modernized partnership strategy, tools and processes.

### **Strategic Enabler: Modernization, driven by Brand and Customer Experience**

2021

- Develop the customer experience strategy, roadmap and action plan.
- Initiate project to modernize TPL's programs and events services and capabilities.
- Complete installation of branch self-checkout and point of sale functionality.

2022-2024

- Resource and implement customer experience initiatives resulting from the strategy roadmap and action plan.
- Fully implement TPL's brand and visual identity and wayfinding enhancements.

### **Strategic Enabler: Modernization, driven by Data and Technology**

2021-2024

- Launch the strategy and deliver the initiatives identified in the roadmap and action plans.

### **Strategic Enabler: Evaluation and Accountability**

2021-2024

- Launch enterprise and divisional scorecards and cascaded performance objectives and evaluate progress to outcomes.

## **Aligning the organization to the strategy and execution plans:**

For TPL to achieve the expected outcomes of its 2020-2024 Strategic Plan, the entire organization must understand what will be required – year by year – and how each individual's role contributes to the overall success of the plan. Aligning the entire organization to the strategic plan execution roadmap will be achieved through annual scorecards and on-going communication.

### **Scorecards**

The TPL balanced scorecard captures actionable objectives across four perspectives – outwardly-focused customer and stakeholder objectives, and inward-looking objectives

that focus on business processes, staff development and support, and financial stewardship. Each objective has performance indicators to measure progress. Weightings are applied to guide the amount of effort and resources that are anticipated to be required to achieve each objective.

Divisions, teams and even individuals also identify objectives that will contribute to achieving the enterprise objectives. These are recorded and tracked on their own scorecards and align with individual performance objectives. This cascaded or laddering of objectives connects everything from top to bottom and bottom to top.

TPL's enterprise balanced scorecard, which maps the library's strategic plan execution roadmap to measurable actions, will be presented to the board for approval at its February 2021 meeting.

### **Monitoring progress and adjusting plans**

The strategic plan execution roadmap describes how TPL will achieve its strategic objectives and outcomes, and the scorecards track the organization's progress against set goals and targets. Business planning is the regular and ongoing process of checking in, confirming, and adjusting annual plans based on progress, new information, risks, opportunities, and other considerations. Staff will conduct quarterly internal reviews to understand progress to scorecard objectives and determine actions needed to remove roadblocks, adjust pace, manage resources, etc. Twice a year, progress will be reported to the Board and to all TPL employees.

Staff will continue to mature the business planning discipline that began in 2019. In 2020, COVID-19 introduced many challenges and changes and TPL was able to quickly and rapidly pivot and adjust business plans. The ability to evaluate and re-plan is a strong foundation to build on that will ensure TPL remains on track over the next several years to achieve the goals and outcomes of the strategic plan.

## **CONCLUSION**

Having this comprehensive roadmap, action plans, scorecards, and on-going review and reporting mechanisms will together support TPL achieving the outcomes articulated in the 2020-2024 "TPL Vital to Toronto" strategic plan.

## **CONTACT**

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## **SIGNATURE**

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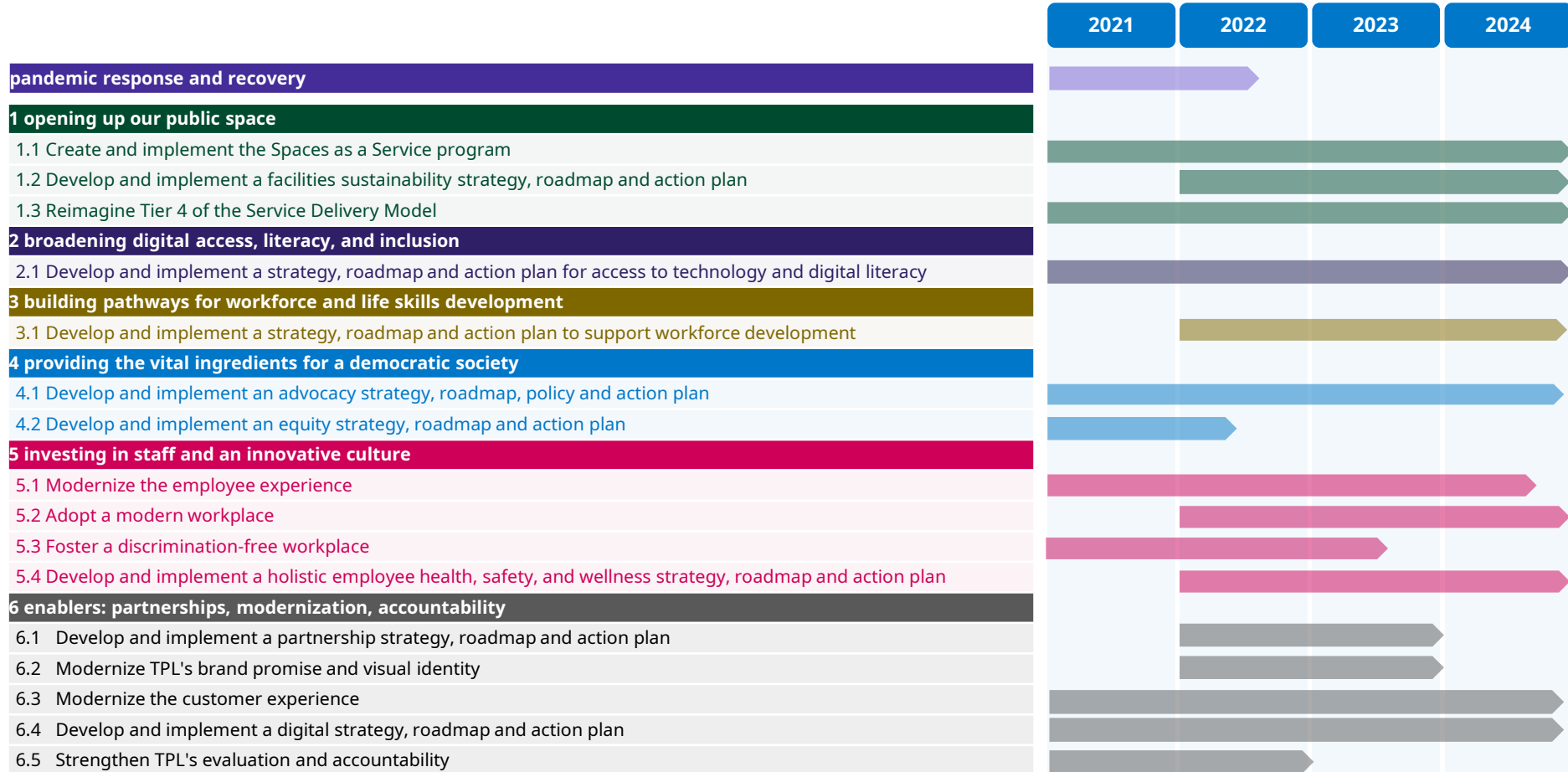
Vickery Bowles  
City Librarian

Attachment 1: TPL strategic plan execution roadmap and 2021 action plan

# TPL strategic plan execution roadmap and 2021 action plan

Toronto Public Library Board Meeting  
January 25, 2021

# strategic plan execution roadmap



# strategic plan 2021 action plan

		Q1	Q2	Q3	Q4
<b>pandemic response and recovery</b>		[Timeline bar spanning Q1 to Q4]			
<b>1 opening up our public space</b>		[Timeline bar spanning Q1 to Q4]			
<b>1.1 Create and implement the Spaces as a Service program</b>	Build a multi-year AODA action plan and complete AODA 2021 initiatives Roll out Incident Management system		[Timeline bar spanning Q2 to Q4]		
<b>1.2 Develop and implement a facilities sustainability strategy, roadmap and action plan</b>	<i>focus in future years</i>	[Timeline bar spanning Q1 to Q3]			
<b>1.3 Reimagine Tier 4 of the Service Delivery Model</b>	Develop a strategy, roadmap and action plan for digital spaces and services		[Timeline bar spanning Q2 to Q4]		
<b>2 broadening digital access, literacy, and inclusion</b>		[Timeline bar spanning Q1 to Q4]			
<b>2.1 Develop and implement a strategy, roadmap and action plan for access to technology and digital literacy</b>	Develop a strategy, roadmap and action plan to expand access to technology and digital literacy			[Timeline bar spanning Q3 to Q4]	
<b>3 building pathways for workforce and life skills development</b>		[Timeline bar spanning Q1 to Q4]			
<b>3.1 Develop and implement a strategy, roadmap and action plan to support workforce development</b>	<i>focus in future years</i>	[Timeline bar spanning Q1 to Q3]			
<b>4 providing the vital ingredients for a democratic society</b>		[Timeline bar spanning Q1 to Q4]			
<b>4.1 Develop and implement an advocacy strategy, roadmap, action plan</b>	Develop and execute the advocacy strategy, action plan and policy	[Timeline bar spanning Q1 to Q4]			
<b>4.2 Develop and implement an equity strategy, roadmap and action plan</b>	Develop the equity strategy, roadmap and action plan	[Timeline bar spanning Q1 to Q4]			

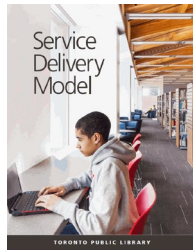
# strategic plan 2021 action plan

		Q1	Q2	Q3	Q4
<b>5 investing in staff and an innovative culture</b>					
<b>5.1 Modernize the employee experience</b>	Develop the employee experience plan, integrated with a modern workplace plan, and identify priorities	▶			
	Develop and execute the workplace reentry plan and remote work strategy, roadmap and action plan	▶			
	Develop and execute the plan to optimize staff productivity, collaboration & communication (O365, Sharepoint, Access)	▶			
<b>5.2 Adopt a modern workplace</b>	<i>focus on future years</i>				
<b>5.3 Foster a discrimination-free workplace</b>	Advance workplace policy initiatives encompassing anti-Black racism and broader diversity and inclusion	▶			
<b>5.4 Develop and implement a holistic employee health, safety and wellness strategy, roadmap and action plan</b>	<i>focus on in future years</i>				
<b>6 enablers: partnerships, modernization, accountability</b>					
<b>6.1</b>	Develop and implement a partnership strategy, roadmap and action plan	<i>focus in future years</i>			
<b>6.2</b>	Modernize TPL's brand promise and visual identity	<i>focus in future years</i>			
<b>6.3 Modernize the customer experience</b>	Develop and implement the customer experience strategy, roadmap and action plan	▶			
	Develop and deliver the Programs & Events Modernization program	▶			
	Complete and implement self-checkout project	▶			
	Complete and implement Point of Sale project	▶			
<b>6.4 Develop and implement a digital strategy and roadmap</b>	Launch the digital strategy and begin to deliver on its 2021 strategic priorities	▶			
<b>6.5 Strengthen organizational evaluation and accountability practices</b>	Roll out strategic plan, execution roadmap and balanced scorecard processes and tools.	▶			

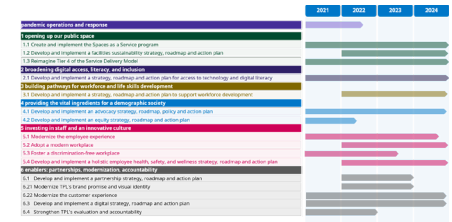


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## strategy execution roadmaps



### focus on equity

- 1 public space
- 2 digital inclusion & literacy
- 3 workforce development
- 4 a democratic society
- 5 public service excellence

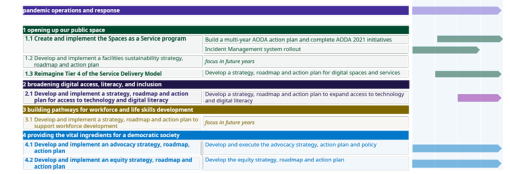
strategic priorities

enablers

- partnerships
- modernization
- evaluation & accountability

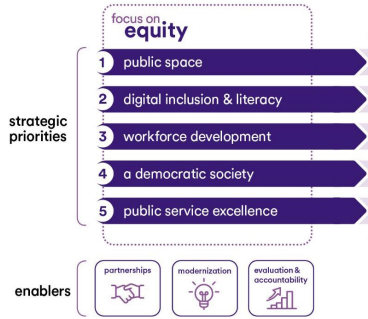


## strategy action plans

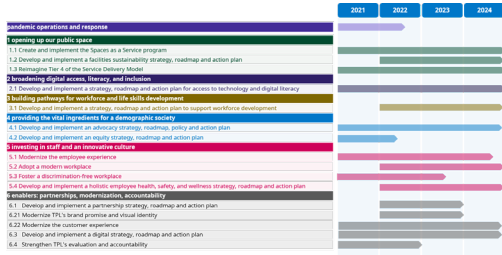


## balanced scorecards

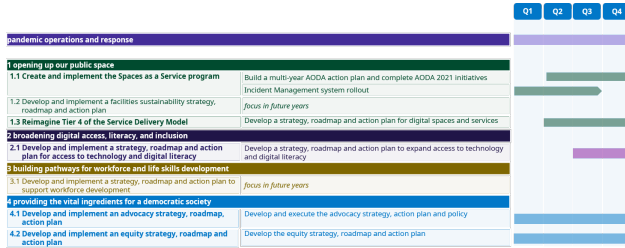
	strategic objectives	measures (KPIs)	targets	weight	strategic initiatives
customers/stakeholders	Provide quality, accessible & inclusive public spaces	• in-person visits • on-line visits	• maintain 2020 levels • 4% increase	30%	
internal business processes	Modernize our data & technology infrastructure	• data & technology maturity	• maintain 2020 levels	40%	
learning & growth	Foster a high-performance work culture by investing in our staff	• health and safety training	• 90% completion	20%	
financial stewardship	Protect TPL's social reputation with our stakeholders	• capital budget	• 85% spend rate	10%	



## strategic plan execution roadmap



## strategic plan 2021 action plan



## enterprise balanced scorecard

	strategic objectives	measures (KPIs)	targets	weight	strategic initiatives
customers/ stakeholders	Provide quality, accessible & inclusive public spaces	<ul style="list-style-type: none"> <li>In person visits on line visits</li> </ul>	<ul style="list-style-type: none"> <li>maintain 2020 levels</li> <li>~1% increase</li> </ul>	30%	
internal business processes	Modernize our data & technology infrastructure	<ul style="list-style-type: none"> <li>data &amp; technology maturity</li> </ul>	<ul style="list-style-type: none"> <li>maintain 2020 levels</li> </ul>	40%	
learning & growth	Foster a high-performance work culture by investing in our staff	<ul style="list-style-type: none"> <li>health and safety training</li> </ul>	<ul style="list-style-type: none"> <li>90% completion</li> </ul>	20%	
financial stewardship	Protect TPL's fiscal reputation with our stakeholders	<ul style="list-style-type: none"> <li>capital budget</li> </ul>	<ul style="list-style-type: none"> <li>85% spend rate</li> </ul>	10%	



# strategic plan execution roadmap

	2021	2022	2023	2024
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<b>1 opening up our public space</b>				
1.1 Create and implement the Spaces as a Service program				
1.2 Develop and implement a facilities sustainability strategy, roadmap and action plan				
1.3 Reimagine Tier 4 of the Service Delivery Model				
<b>2 broadening digital access, literacy, and inclusion</b>				
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<b>3 building pathways for workforce and life skills development</b>				
3.1 Develop and implement a strategy, roadmap and action plan to support workforce development				
<b>4 providing the vital ingredients for a democratic society</b>				
4.1 Develop and implement an advocacy strategy, roadmap, policy and action plan				
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<b>5 investing in staff and an innovative culture</b>				
5.1 Modernize the employee experience				
5.2 Adopt a modern workplace				
5.3 Foster a discrimination-free workplace				
5.4 Develop and implement a holistic employee health, safety, and wellness strategy, roadmap and action plan				
<b>6 enablers: partnerships, modernization, accountability</b>				
6.1 Develop and implement a partnership strategy, roadmap and action plan				
6.2 Modernize TPL's brand promise and visual identity				
6.3 Modernize the customer experience				
6.4 Develop and implement a digital strategy, roadmap and action plan				
6.5 Strengthen TPL's evaluation and accountability				

# strategic plan execution roadmap



# strategic plan execution roadmap



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**thank you**