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STAFF REPORT
INFORMATION ONLY

2021 Enterprise Balanced Scorecard – Progress Update

Date:	September 27, 2021
To:	Toronto Public Library Board
From:	City Librarian

SUMMARY

The purpose of this report is to provide a mid-year progress update on Toronto Public Library's (TPL's) 2021 enterprise balanced scorecard.

TPL continues to respond and adapt to the COVID-19 pandemic. Pandemic response initiatives are included in the 2021 enterprise balanced scorecard, along with TPL's strategic and business planning priorities. The 2021 enterprise balanced scorecard monitors progress towards advancing the strategic plan's priorities and outcomes and enables the adjustment of annual plans as necessary.

This progress update includes red-yellow-green status and year-end trends on the 2021 enterprise balanced scorecard (see Attachment 1).

FINANCIAL IMPACT

There is no financial impact beyond what has already been approved in the current year's budget.

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 directed staff to develop a balanced scorecard, key performance indicators and associated activities for Board approval in early 2020:

https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/nov25/12d-spsc-strat-plan-2020-2024-resilience-success-well-being-combined.pdf

At its February 24, 2020 meeting, the Library Board approved the strategy map and the enterprise balanced scorecard template and directed staff to develop and implement the enterprise balanced scorecard and provide an annual update of the 2020 enterprise balanced scorecard in early 2021:
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 the *2020-2024 Strategic Plan: COVID-19 Impact Analysis and Communications Plan – Update* report that provided an overview of the findings from staff's COVID-19 impact analysis on the plan's five priorities and enablers of the 2020-2024 Strategic Plan:
https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2020/jun22/20-strategic-plan-2020-2024-covid19-comms-plan-update-combined.pdf

At its November 16, 2020 meeting, the Library Board received the *TPL Board Education - Implementation of Strategic Plan Execution Roadmap* presentation that provided an overview of TPL's strategic plan execution roadmap:
https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2020/nov16/10-tplb-education-strat-plan-execution-roadmap-implementation.pdf

At its January 25, 2021 meeting, the Library Board received the *Strategic Plan Execution Roadmap and 2021 Action Plan* report that provided an overview of how TPL plans to achieve the outcomes of its strategic plan over the next four years:
https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2021/jan25/20-strategic-plan-execution-roadmap-and-2021-action-plan-combined.pdf

At its April 26, 2021 meeting, the Library Board received the *2020 and 2021 Enterprise Balanced Scorecards* report, reviewed the progress made in 2020, and approved the 2021 enterprise balanced scorecard:
https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2021/apr26/14-2020-and-2021-enterprise-balanced-scorecards-combined.pdf

COMMENTS

TPL uses a strategy map and balanced scorecard to measure and evaluate the progress towards advancing the 2020-2024 strategic plan's priorities and outcomes.

The strategy map illustrates the Library's overall objectives for 2020-2024 and how the objectives relate to one another. The enterprise balanced scorecard translates the five strategic plan priorities into 13 objectives across four perspectives. It shows how the Library aligns its resources and builds capacity through learning and growth and internal business processes to deliver against the strategic plan's priorities and outcomes.

Each objective has key performance indicators (KPIs) that measure and evaluate the progress towards advancing the 2020-2024 strategic plan's priorities and outcomes. KPIs are re-examined on an annual basis and can change over time to ensure they continue to be achievable, relevant and effective in measuring towards the strategic objectives.

2021 Enterprise Balanced Scorecard Mid-Year Progress (Attachment 1)

Due to 2020 being a unique year with the COVID-19 public health emergency, staff could not establish baseline metrics for some of the 2021 key performance indicators. As a result, staff will use 2021 and future years to establish baseline metrics. Where possible, staff set 2021 targets for some of the key performance indicators assuming that TPL will continue to operate in a similar service environment as 2020 (e.g. pandemic response).

The strategic initiatives identified in the 2021 enterprise balanced scorecard reflect TPL's 2021 Strategy Action Plan. Staff shared the Action Plan with the Library Board at its January 25, 2021 meeting.

To summarize TPL's mid-year progress:

- Eight objectives are on track; four are slightly off track; and one is off track;
- Of the five objectives that are not on track, three are expected to improve before the end of the year;
- Information on KPI progress and TPL's response to objectives that are not on track is provided in Table 1;
- Note that mid-year targets were not set for all KPIs, thus most progress is noted against year-end targets.

Table 1. Response to objectives that are “slightly off track” or “off-track”

Objective	Relevant KPI(s)	Mid-Year Progress	Response
C2. Increase access to technology and digital literacy	C2.3 Digital inclusion initiatives to support equity-deserving groups and vulnerable populations	This objective is off track due to branch closures and reduced service levels from the pandemic.	This is expected to continue to trend down as physical distancing requirements are expected to continue.
C5. Delivery exceptional customer experiences	C5.2 Customer satisfaction with the helpfulness of library staff C5.3 Customer satisfaction overall	Due to the pandemic and re-prioritization of resources, the customer satisfaction survey did not take place.	Customer service survey will be conducted in 2022 so the baseline is set during a more typical year.
B1. Modernize our data & technology infrastructure	B1.2 Digital strategy initiatives completed within scope and schedule.	A number of Digital Strategy initiatives have commenced, however it is unlikely this target will be met by end-of-year.	The number of completed initiatives is expected to increase; however, the objective is still expected to finish slightly off-track.
B2. Increase service awareness and access	B2.1 Audience and reach activities B2.2 Customer engagement activities	Seasonal fluctuation in customer use of social media, combined with fewer service promotions during the summer, have resulted in lagging audience reach and customer engagement activity.	Expected to trend up in the second half of the year as more library services are reinstated.
L1. Foster a high-performance work culture by investing in our staff	L1.1A Staff participation for engagement initiatives L1.2 Action plans that enable a high-performance work culture completed within scope and schedule	2021 focus on engagement has been focused on pandemic response. Staff uptake on learn:tpl has increased.	Diversity and engagement staff survey is scheduled for fall 2021. L1.2 is expected to hit the year-end target. Expected to trend up in the second half of the year.

Year-end enterprise scorecard results will be presented in Quarter 2, 2022.

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SIGNATURE

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ATTACHMENTS

Attachment 1: TPL Strategy Map and 2021 Enterprise Balanced Scorecard

Strategic Objective	Status	Mid-Year Progress	Trend
C1. Provide quality, accessible and inclusive public spaces	GREEN	Online Visits continued to be strong, surpassing 2020 Q2 YTD by 5%, despite the pandemic's closures and reduced on-site service levels. Initiatives to support equity-deserving groups continued to be a focus of TPL's pandemic service response, with 2021 initiatives surpassing 2020 levels.	▲
C2. Increase access to technology and digital literacy	RED	Computer workstation and Wi-Fi use are down significantly from 2020, due to branch closures and reduced service levels from the pandemic. As these activities make up the bulk of our digital initiatives supporting equity-deserving groups & vulnerable popns, we're not likely to surpass 2020 if physical distancing restrictions remain through 2021 . We are not tracking Fill rate or Customer Satisfaction for digital literacy programs at this time, so they are also not factored in our overall assessment.	▼
C3. Deliver relevant workforce and skills development services	GREEN	We continue to deliver relevant workforce and skills development services throughout the pandemic – these services continue to be in demand and we are well on track to meeting our year end target.	▲
C4. Facilitate access to information, information literacy and civic engagement	GREEN	Electronic circulation continues to be strong and it's up 11% compared to Q2 YTD. We fully anticipate meeting our year end target.	▬
C5. Deliver exceptional customer experiences	YELLOW	At the start of the pandemic we quickly moved Answerline to a virtual environment. The implementation and resulting service have been a huge success with very positive feedback received from customers. It was in plan to conduct customer satisfaction surveys in 2021, however due to the pandemic and the reprioritization of resources, the survey did not take place. And, because it makes little sense to set a baseline in a year that is such an anomaly, we will conduct the survey and set baseline in 2022.	▬
B1. Modernize our data & technology infrastructure	YELLOW	A number of Digital Strategy initiatives have commenced, however adjusting to new processes and ways of working is still gaining momentum. Process modernization and stronger project management discipline will have long-term benefits to achieving these goals.	▬
B2. Increase service awareness and access	YELLOW	As of QTR 2 2021, customer engagement activity is above 50% of 2020 actuals. However, seasonal fluctuations in customer use of social media combined with fewer service promotions during the summer have resulted in lagging audience reach and customer engagement activity. Activities are expected to pick up in the fall, with more library services being reinstated.	▲
B3. Minimize service disruptions	GREEN	Processes are being implemented to track, however security incidence response time and planned system uptime are expected to meet target levels due to ongoing resourcing and talent acquisition.	▬
B4. Make informed decisions through enhanced governance and accountability	GREEN	Strategic plan and execution roadmap have been rolled out, and are used to inform key decisions. Planned divisional scorecards will be used to track progress and maintain accountability. Number of business intelligence products to inform key decisions is expected to meet targets.	▬
L1. Foster a high-performance work culture by investing in our staff	YELLOW	2021 focus of engagement activities has been on pandemic response, through staff town halls and other methods. The diversity and engagement staff survey is scheduled for rollout in fall 2021. Staff uptake of learn:tpl has increased and a recent enterprise staff development survey gauged satisfaction of use. In 2021, 1,151 staff members completed one learning activity or object per month on average.	▲
L2. Increase TPL Staff Digital Literacy	GREEN	The focus of formal and informal training was support for digital services delivery, collaboration tools, remote work and cyber security with the launch of mandatory training for all staff.	▬
L3. Foster a workforce that reflects and responds to our diverse society	GREEN	Rollout of anti-Black racism on track, 100% completion by Directors, 94% by managers, employee rollout commencing. Diversity and engagement survey on schedule for fall 2021 rollout. Courses have been offered in partnership with other divisions to assist staff in adapting to COVID-19, advance legislative and strategic priorities, support staff in building awareness and knowledge of equity deserving groups, and address risk.	▬
F1. Protect TPL's fiscal reputation with our stakeholders	GREEN	This is a full year forecasted outcome and we're establishing baseline in 2021. The impact of COVID-19 on library operations has resulted in operating budget savings and this is expected to continue throughout the year. For the capital budget, the pandemic and planning reprioritization have resulted in some project delays.	▬

These are fantastic results given ongoing pandemic response efforts