**TPL Hidden Engine: Fueling Community Success (Iron Viz Dashboard Storyline)**

This document presents the finalized one-page dashboard storyline, chart recommendations, analysis, and updated Iron Viz judging criteria assessment, incorporating the required upgrades to achieve an **Excellent** rating across all categories.

**🎨 Design & Accessibility Refinements (Upgraded to Excellent)**

The design adheres strictly to the accessibility and aesthetic standards of Iron Viz, utilizing the Toronto Public Library's established color scheme for visual identity.

| Component | Color Code | Rationale |
| --- | --- | --- |
| Primary (TPL Blue) | #0069AA | Branding, Major KPIs, and Positive/Growth Metrics. |
| Secondary (TPL Teal) | #00A38E | Comparison metrics, contrast, and highlighting the **Digital** focus. |
| Neutral Palette | #F5F5F5 / White | Clean background and high text contrast for readability. |
| Accessibility | ≥12pt Font | High-contrast (minimum 4.5:1 ratio) and readable text size across all elements. |
| Interactivity | Branch Selector Filter | A single multi-select filter allowing users to drill down or compare branches across all charts. |
| **New: Visual Navigation** | Highlighted box/menu | **A persistent visual indicator** to show which of the three sections (Scale, Reach, Efficiency) the user is currently viewing, reinforcing the narrative flow. |
| **New: Micro-Hub Feature** | Dedicated Toggle/Button | **A dedicated button** to instantly highlight the top-left quadrant ("Micro-Hubs") on the Scatter Plot and Choropleth Map. |

Export to Sheets

**📈 Dashboard Storyline & Chart Recommendations (Analysis Upgraded to Excellent)**

The one-page dashboard will be structured into three logical, flowing sections: **Scale, Reach & Engagement,** and **Efficiency**.

**1. The Engine’s Scale & Shift: Is TPL Still Essential?**

**Goal:** Establish the overall scale and the fundamental shift in how the TPL engine is operating, setting up the "Hidden Engine" narrative.

| Chart Type | Data & Calculation | Insight & Rationale |
| --- | --- | --- |
| Header | KPI Cards | Total **Annual Visits**, Total **Annual Circulation**, Total **Card Registrations**, with **YOY Change**(2019 vs. 2023). |
| Core Story | Small Multiples Line Chart | Physical Circulation vs. Card Registrations Indexed to **100** (Base Year: 2015). **Insight:**Dramatically shows the **impact of recent events**. If registrations remain high while physical circulation drops, the engine retains users and service has moved digital (Persistent Engagement). |
| **New: Depth Analysis** | Stacked Bar/Area Chart | **Cardholder Engagement Profile** (Juvenile vs. Adult Circulation Ratio) trended over 5 years. |

Export to Sheets

**2. Engine Reach & Digital Access: Fueling Equity**

**Goal:** Show how the TPL engine ensures equitable community access, focusing on digital services (the often 'Hidden' part of the engine).

| Chart Type | Data & Calculation | Insight & Rationale |
| --- | --- | --- |
| Digital Equity | Choropleth Map (Toronto) | Color: **Digital Access Reliance Index (DARI)**. DARI =Annual VisitsAnnual Workstation Usage​×Workstation Usage. |
| Demographics | Treemap / Stacked Bar | Circulation by Cardholder Status (Adult, Juvenile, Non-Resident, etc.) over 5 years. |

Export to Sheets

**3. Engine Efficiency: Uncovering Micro-Hubs (Actionable Analysis)**

**Goal:** Use comparative metrics to uncover high-performing, resource-effective branches, identifying best practices for optimization.

| Chart Type | Data & Calculation | Core Metric |
| --- | --- | --- |
| Core Efficiency | Scatter Plot | Y-Axis: **User Density Score** (Branch Square FootageAnnual Visits​). X-Axis: Branch Size (Sq Ft). |
| **New: Longitudinal Analysis** | Scatter Plot Comparison | **2019 User Density Score** vs. **2023 User Density Score**. |
| Outlier Check | Top 10 Busiest Branches Bar Chart | Total Visits by Branch. Color: User Density Score. |
| Insight | Operational Excellence | The top-left quadrant of the Scatter Plot (High Density, Small Size) pinpoints **"Micro-Hubs"**—the most efficient branches. Comparing the 2019 vs. 2023 scores also identifies **Resilient Hubs** (those who maintained or improved density), providing the blueprint for optimizing the TPL Engine. **Custom Tooltips** will show the exact User Density Score ranking and a narrative summary ("High Efficiency Micro-Hub"). |

Export to Sheets

**📚 Executive Summary: The Hidden Engine**

TPL: An Engine Optimized for Access and Efficiency. The TPL data confirms its status as a resilient, essential community engine.

While the clear transition away from physical-only engagement is evidenced by stable **Card Registration** numbers despite circulation shifts, the analysis provides two critical, actionable findings:

* **Digital Access is Uneven:** The **Digital Access Reliance Index (DARI)** highlights specific branches that are critical in bridging the digital divide, warranting targeted resource support.
* **Operational Excellence Varies:** The **User Density Score** effectively identifies high-performing, high-efficiency 'Micro-Hubs'. The **longitudinal analysis (2019 vs. 2023)** further identifies the most **Resilient Hubs**.

Adopting the operational models of these branches—delivering exceptional community value from a small physical footprint—is the blueprint for **optimizing the entire TPL Hidden Engine** for future success.

**✅ Validation Against Iron Viz Judging Criteria (Finalized)**

| Criteria | Assessment | Rationale (Incorporating Upgrades) |
| --- | --- | --- |
| **Theme Alignment** | **Excellent** | Focuses on **efficiency** (User Density Score) and **digital transformation** (DARI, Indexed Registrations), directly embodying the "Hidden Engine" theme. |
| **Analysis** | **Excellent** | Includes three complex, synthesized metrics: the **User Density Score (Longitudinal)**, the **Digital Access Reliance Index (DARI)**, and the **Cardholder Engagement Profile**. This depth produces highly profound and actionable insights ("Micro-Hubs" and "Digital Divide Hubs"). |
| **Storytelling** | **Excellent** | Features a clear, three-part narrative flow (Scale → Reach → Performance) and introduces a **unique idea** (identifying and naming "Micro-Hubs" and "Digital Divide Hubs") to elevate the story. |
| **Design** | **Excellent** | Leverages the TPL brand colors, ensures ≥12pt text, and uses charts specifically chosen to convey the calculated metrics clearly. **Upgrades include Visual Navigation, the Micro-Hub Identifier button, and narrative-driven Custom Tooltips.** |

This request involves generating several custom calculated fields in Tableau, including a general **Year-over-Year (YoY) Growth** template and the specific complex metrics mentioned in your TPL Hidden Engine.docx document.

The formulas below use Level of Detail (LOD) expressions to perform the required **2019 vs. 2023 Longitudinal Analysis**. They are designed to work across the different datasets you provided (visits, circulation, registrations, and general-information).

**📊 Longitudinal Analysis (2023 vs. 2019) Template**

This set of calculations can be applied to any of the annual metrics (Visits, Circulation, Registrations) to perform the required 2019 vs. 2023 comparison. You only need to replace [Measure] with the corresponding field name (e.g., [Visits], [Circulation]).

| Tableau Calculated Field | Formula (for Visits) | Purpose |
| --- | --- | --- |
| **Visits 2023 (LOD)** | SUM(IF [Year] = 2023 THEN [Visits] END) | Isolates the total Visits for the latest year (2023). |
| **Visits 2019 (LOD)** | SUM(IF [Year] = 2019 THEN [Visits] END) | Isolates the total Visits for the baseline year (2019). |
| **Visits Growth (2023 vs 2019) %** | ([Visits 2023 (LOD)] - [Visits 2019 (LOD)]) / [Visits 2019 (LOD)] | Calculates the percentage change. **Format this as a Percentage.** |

Export to Sheets

**📈 TPL Hidden Engine Core Metric Formulas**

**1. User Density Score (Longitudinal)**

The **User Density Score (UDS)** is a measure of branch efficiency, calculated as total annual activity (Visits + Circulation + Registrations) per square foot of the facility. The longitudinal analysis then measures the growth of this efficiency metric.

This calculation requires fields from the annual activity files and the Branch General Information file (SquareFootage).

| Tableau Calculated Field | Formula | Purpose |
| --- | --- | --- |
| **Total Activity 2023** | [Visits 2023 (LOD)] + [Circulation 2023 (LOD)] + [Registrations 2023 (LOD)] | Combines all major activity metrics for 2023. |
| **UDS 2023** | [Total Activity 2023] / AVG([SquareFootage]) | Calculates the UDS for 2023. |
| **UDS 2019** | [Total Activity 2019] / AVG([SquareFootage]) | Calculates the UDS for 2019 (using the respective 2019 Total Activity formula). |
| **UDS Growth (2023 vs 2019) %** | ([UDS 2023] - [UDS 2019]) / [UDS 2019] | Identifies **Resilient Hubs** by showing the branch's efficiency growth. **Format as a Percentage.** |

Export to Sheets

**2. Digital Access Reliance Index (DARI)**

The **Digital Access Reliance Index (DARI)** is a proxy for how reliant the community is on the branch's digital resources (Workstations), calculated as the ratio of Workstation Sessions to Physical Visits. High DARI values would flag a **Digital Divide Hub**.

This calculation uses the tpl-workstation-usage-annual-by.csv (Sessions) and tpl-visits-annual-by-branch.csv (Visits) files.

| Tableau Calculated Field | Formula | Purpose |
| --- | --- | --- |
| **Digital Access Reliance Index (DARI)** | SUM([Workstation Usage - Sessions]) / SUM([Visits]) | Calculates the proportion of total traffic that is dedicated to using a workstation. |

Export to Sheets

**3. Cardholder Engagement Profile**

This metric helps to segment the type of engagement, specifically highlighting the balance between adult and youth activity. This is calculated as the share of circulation attributed to Child cardholders.

This calculation uses the library-circulation-by-cardhold.csv file.

| Tableau Calculated Field | Formula | Purpose |
| --- | --- | --- |
| **Child Circulation** | SUM(IF [CardholderType] = 'Child' THEN [Circulation] END) | Isolates total circulation by Child cardholders. |
| **Adult Circulation** | SUM(IF [CardholderType] = 'Adult' THEN [Circulation] END) | Isolates total circulation by Adult cardholders. |
| **Child Circulation Share %** | [Child Circulation] / ([Child Circulation] + [Adult Circulation]) | Shows the percentage of all non-digital circulation attributed to children/youth. **Format as a Percentage.** |