OMAHA STEM ECOSYSTEM

STRATEGIC PLAN
2020 - 2023

Table of Contents

Our Strategic Planning Process

The Omaha STEM Ecosystem (OSE) stakeholders and staff met in five virtual sessions as a team to co-create and build an innovative strategic plan. This included updating the mission and vision for the organization, setting the practical vision for the future, determining the strategic direction and annual strategic goals, and creating a year-one implementation plan

Participants that attended one or more days were the following: **Megan Addison** (Collective for Youth), **Mike Flesch** (Metropolitan Community College), **Neal Grandgenett** (University of Nebraska at Omaha), **Elizabeth Mulkerrin** (Omaha Henry Doorly Zoo and Aquarium), **Andreia Nebel** (Clarkson College), **Chris Schaben** (Omaha Public Schools), **Tracie Reding** (University of Nebraska at Omaha), **David Hopp** (OPS Compass), **Jenna Yentes** (University of Nebraska at Omaha), **Dana Richter-Egger** (University of Nebraska at Omaha), **Jim Dennell** (BCDM Architect), **Lori Bachle** (Clarkson College), **Karlus Cozart** (C3K1 Consulting, LLC), **Christine Cutucache** (University of Nebraska at Omaha), **Jim Collison** (Gallup), **Jeffrey R. Sebree** (Union Pacific), Levi Thiele (AIM Institute), **Laurie Zagurski** (OPPD) and **Julie Sigmon** (Omaha STEM Ecosystem).

Parlay Consulting Firm, Inc. (Parlay) was hired as consultants for the current initiative. Parlay has experience with over 85 non-profit organizations, government entities and for-profit companies in Nebraska, Iowa, and Missouri. Parlay provides organizational development services based on the unique needs of your board of directors, leadership team, employees, and community. They work with organizations to identify what their talents, resources and expertise are to parlay them into desired results. Through collaborative strategies, Parlay designs the best project plan to optimally support organizations. They offer needs assessment, strategic planning, board governance development, implementation coaching, stakeholder surveys/interviews, program evaluation, facilitation services and other services to build an organization's capacity and desired outcomes.

Lead facilitator for this project was Beth Morrissette, MPA, MSW.

Our Mission

The Omaha STEM Ecosystem is building a stronger STEM community by connecting education and business development for tomorrow's workforce.

Our Vision

Our vision is transforming Omaha into a robust center of STEM Excellence and innovation.

A Letter from the Director

Hello,

Four years ago, in 2016, the Omaha STEM Ecosystem (OSE) was launched to address the overwhelming shortfall of current and future STEM professionals in Omaha and across Nebraska. The demand for STEM talent has increased 31% over the past 10 years, and that trend is continuing, according to the Greater Omaha Chamber.

Nebraska's statistics from the U.S. Department of Education suggest a pending skills gap in the areas of Science, Technology, Engineering and Mathematics. Less than 46% of the state's 4th grade students are proficient in mathematics. By 8th grade, proficiency drops to less than 38%. Similar is true in science, with proficiency less than 47% among 4th grade students and less than 41% among 8th grade students.

Early studies indicated the Greater Omaha area had numerous resources for STEM education and engagement but was operating in a silo that often did not align with business and industry needs. Our challenges included identifying critical workforce skills, aligning curriculum content with careers of the future, and providing access for all community members to quality STEM education programs.

We realized there was no single initiative that could close the STEM talent gap, as the issues we faced were complex. We started with a vision of what Omaha's STEM community could look like and how the Omaha STEM Ecosystem could have an impact in developing a strong and vibrant STEM-focused community. Through the power of connections, collaborations, and communication we started to develop a shared understanding of the core talent needs and an actionable framework for our collective efforts to build the community's STEM workforce.

Our current efforts include the development of this updated strategic plan, guiding our work through 2023. Through the commitment of more than 20 participants and their supporting organizations across all sectors, the stage has been set for a commitment to build a strong infrastructure, engage community partners, advocate for innovative programs, and expand evidence-driven research, assessments and outcomes.

This collective effort will continue to move forward through strategic partnerships to make Omaha a robust center of STEM excellence and innovation.

Julie Sigmon

Director of Omaha STEM Ecosystem

Our Mission

The Omaha STEM Ecosystem is building a stronger STEM community by connecting education and business development for tomorrow's workforce.

Our Vision

Our vision is transforming Omaha into a robust center of STEM excellence and innovation.

Practical Vision. OSE will...

- Build Strong Infrastructure & Capacity to Support Mission Impact

- Advocate for Programs & Innovative Models

- Expand Evidence-Driven Research, Assessments & Outcomes

- Engage Community through Communication, Collaboration & Connection

- Diversify Funding to Assure Financial Sustainability

- Grow Community Development, Recruitment & Retention

Strategic Directions & 2023 Goals
OSE will accomplish this vision by…

1. Building Sustainability to Increase Impact

OSE will use their business plan that includes development of a robust staffing infrastructure, committee support, and succession planning.

OSE will have an operational and diverse business plan that includes leveraging community partnerships that diversify funding sources and processes for contractual obligations.

2. Expanding Communication to Elevate Collaboration

OSE will implement a concise brand that includes common vocabulary.

OSE will implement a Communication Plan.

OSE will engage all Stakeholders.

3. Measuring Impact to Ensure Progress

OSE will use a focus group comprised of equal representation from each sector to test and iterate the data depository.

OSE will finalize the metric list and publish/distribute.

OSE will have common, data collection metrics specific for each sector will be published and distributed.

OSE will have identified research questions for each sector that lead to one common research outcome to measure the impact of OSE on the Omaha area.

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Telling Our Story

The strategic planning began with the Director, Julie Sigmon, highlighting historical successes and more recent successes since the most recent strategic plan.

Our Journey

Started as a dream – like-minded folks that didn't give up got together and started building a shared vision of possibilities. They saw a vision of what our community could be if silos were broken down and organizations came together with a common goal – to develop pathways for students from early childhood to career.

The original branding was the tree. It signified reaching out to community – educate our partners in the value of STEM learning and the impact on building future workforce. For us to sell the vision, we applied to the STEM Funders Network (SFN) in 2015; denied because we were not yet a formal organization. The Nebraska University Foundation and Omaha Zoo and Aquarium Foundation believed in the vision and gave us a foundation to start. The next year, we were accepted in the SFN as part of cohort two. Today, SFN is in 34 cities and now they are at 89 locations –including international ecosystems.

Since our beginning, we have been able to hire a Director, build our organizational structure and have developed our Charter to guide our work. During the building of Omaha STEM Ecosystem (OSE), we leveraged the humor of our founders, and built a strong base of stakeholders. We had a launch celebration where approximately 100 individuals attended. We worked closely with SFN and Sarah Koebley to develop our first strategic plan.

Since we started, we have had over 800 organizations join our listserv; over 210 actively engaged and 72 active members of committees. We accomplished the following:

- Updated our Charter to reflect our sustainability plan

- Selected and approved a slate of officers for the Executive Committee

- Created a recognizable brand that includes a logo and marketing pieces (updated 2020)

- Established a communication plan/message mapping

- Connected and developed collaboration with education sector and business, non-profits, etc.

- Connected and collaborated with youth programs –

  - ACE Mentoring at the Zoo

  - NE Sci Fest

  - UNO/BODYMODELS

  - UNMC UBeats

  - OHDZA City Nature Challenge, etc.

  - Math Teaching Circles – BVH, MCC, OHDZA, UP, Clarkson, Biomechanics Research, Olsson

The Future

As a collective impact organization, our work is complex, but we've gained clarity and understanding about this type of work. We know there is not a single initiative that can close the STEM talent gap problem that Omaha is facing. Our challenge spans from identifying critical work skills, aligning curriculum content with future careers, and provide access to resources for everyone in our community. We know, we are making some progress, through connecting resources, developing collaboration and we've begun to develop a shared understanding of the core talent needs and actionable frameworks that inform our collective efforts in building the community's future leaders and workforce. In the next three years we could be seen in Omaha as the Center of STEM Excellence, elevate level of collaboration to fuel workforce develop, align language and goals around STEM-focused workforce and build an inclusive and equitable for all in our community.

Current Reality

During Strategic Planning Part I, the team began listing the strengths and weaknesses of the current environment. This includes internal and external factors. The internal strengths and weakness of OSE and the external opportunities and threats we must plan for.

Table 1.1 Current Reality - Strengths

	Strengths
INTERNAL	- Dedicated volunteers - Wonderful commitment from Julie and the initial founders (Neal, Elizabeth, Christine, Jim, etc.) - Dedicated collaborators – everyone shows up to events/meetings/shows buy-in by "voting with their feet" - We have a Director! - A group of community members that all have a great understanding of the needs (shared understanding of need) - Diverse backgrounds of individuals - Areas of expertise - Businesses -- sponsorship and buy-in - Jointly sponsored by the zoo and university - OSE appears to have stable funding sources (e.g. grants, sponsorships) - Strong leadership - Creation of investment of businesses of OSE success - Being meaningful about utilizing strategic planning and utilizing – not a document on the shelf - Strength in the breath of what is going on (opposite of one-person show)/multiple committees, sectors/robust - Strong community of volunteers and stakeholders

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Current Reality - Continued

Table 1.2 Current Reality - Weaknesses

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<td rowspan="2">INTERNAL</td>
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Weaknesses
- Public awareness - communicating with public (people don't know who we are)
  - We tend to replicate efforts
  - Not all target groups are aware of us
- Our initiatives change too frequently - need to stay focused
- As an organization we need to focus on one theme
  - How can we centralize efforts better?
- Follow-up
  - Where does connectivity end and responsibility start?
- Lack of "full-time" staff and support
- Sustainability planning
- Lack of inclusiveness, too many separate agendas
- Should OSE align to existing organizations such as Nebraska
- Academy of Sciences or others?
- Lack of direct connections for business partnerships for talent - there is an existing shortage of talent, yet there are direct asks/partnerships for talent (university or life-long learners)
- Lack of consistent, sustainable budget

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Current Reality - Continued

Table 1 .3 Current Reality – Opportunities

Opportunities	Opportunities	
- Increasing community-based grants, based on national "Charting a Course for Success" document - Increasing community partner led grants (i.e. Beyond School Bells, MCC, UNO, Zoo, etc.) - Leveraging the more technology-based companies that are coming to Omaha area - Workforce development is increasingly number 1 focus for Economic Development (many people interested) - River Front opportunities and energy, and the invitation to OSE to partner - Increasing conversations with the Chamber - COVID-19 as a shared experience toward more innovation in STEM (Myths for delivery being dispelled) - Improving project management processes – increase follow through - Increase OSE brand recognition - Get logo out - Communication & Marketing – social media - Taking the lead on Metro Sci/Eng Fair – how do we get the message out more efficiently? - Could/should we narrow our focus?	- Define work terms (i.e. workforce) - Collaboration with like-minded organizations - Ensure our branding is obvious - Opportunity to connect - educators with business - Invite other organizations to events - Seek input to help connect - We have been going out to other businesses and participating/ supporting them - Let's get them to let others know what we're doing - Better quantify the return on investment for STEM education, workforce, etc. - COVID-19 is similar to the space race, oil crisis, 911, etc. as a catalyst to future innovation, etc. - People are increasingly looking for different career pathways, etc. - Opportunities for career realignment, etc. - Increased opportunities to work with Lincoln, Greater Nebraska, blurring the lines, etc. Could/should we narrow our focus?	EXTERNAL

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Current Reality - Continued

Table 1.4 Current Reality – Threats

Threats	Threats	
- Sustainable funding - Sustaining funding as COVID-19 increasingly needs resources (i.e. Foundations, federal funding, etc.) - Unforeseen future - may have dramatic impact on education and business (shift in paradigm, what is the paradigm) (also present awesome opportunity) - Ongoing brain drain and departure of talent – competing with other areas - Maintaining focus on mission and vision - STEM encompasses everything - Trying to do too many things - Being able to demonstrate that we are making change in the community, especially to maintain buy-in from businesses - Ensuring collaboration versus competition between consortiums - Communicating to avoid duplication among organizations as they lead initiatives - Branding position of first choice for STEM participation, an ensuring OSE is seen as the information center (i.e. United Way context for example) - Purposeful scaling up, can be a challenge, and needs continued communication	- Affordability of STEM Education, as for example, engineering education, etc. - Historic inertia as the silos strive to continue - Policies that may be unhelpful or not purposeful (need to make sure they are well written and incentives for businesses are sound for attraction) - Increasing competition for resources - Funding - People's time - Other initiatives that may not be STEM focused but also competing - Not enough people know what the OSE is doing, name recognition - Communicate clearly the purpose, mission, vision - How different people fit into the ecosystem and getting their buy-in - Trying to do something new and different with that comes fear and paralysis, not stepping into the unknown, not taking steps - Threat that it all looks nationally different, international pressures/competition/etc.	**EXTERNAL**

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Practical Vision

We will...

Build Strong Infrastructure & Capacity to Support Mission Impact
Advocate for Programs & Innovative Models
Expand Evidence-Driven Research, Assessments, & Outcomes
Engage Community through Communication, Collaboration & Connection
Diversify Funding to Assure Financial Sustainability
Grow Community Development, Recruitment & Retention

This was a time for participants to share their practical hopes and aspirations for the future of OSE. Participants were instructed to:

"Imagine that it is three to five years from now, Omaha STEM Ecosystem has been selected as the premier organization of the year. OSE is going to be highlighted in a video production about OSE for the award. You have been selected to conduct the tour through the organization."

Participants were then asked a series of thought-provoking questions to ponder as they envision the future for the organization. After small group discussion and large group consensus work, participants agreed upon a set of practical vision elements, and then a shared vision of OSE's future.

Ultimately, we answered the question, "What do we want to see in place for capacity, programming, and financial sustainability for Omaha STEM Ecosystem by July 31, 2023 as a result of our work today?"

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Table 2 represents the group work and consensus to discover the practical vision elements. The items listed below each agreed upon vision element, provide insight into some of the intent and conversations that led the group to the practical vision elements.

Table 2. Practical Vision Consensus Building

By July 31st, 2023 we will …

PV 1 Build Strong Infrastructure & Capacity to Support Mission Impact	PV 2 Advocate for Programs & Innovative Models	PV 3 Expand Evidence-Driven Research, Assessments, & Outcomes	PV 4 Engage Community through Communication, Collaboration & Connection	PV 5 Diversify Funding to Assure Financial Sustainability	PV 6 Grow Community Development, Recruitment & Retention
More positions - marketing, web developer	Improve, support, promote community programs	Metrics & Research	Communication driven by members	Diversified funding model	Skill analyzer and **connects to jobs in Omaha**
Develop SYSTEMS (for time, talent, and treasure)	Committee chairs drive ideas, assist implementation	Metrics and data for recruitment and data-driven policy	Have a defined way of getting activities from K-16 through careers (e.g. online portal): We provide the communication, collaboration, and connectivity to make it happen	Funding: people approach us, services are rendered,	Growth in the economy because new STEM businesses, reversal of the brain drain
Expand organization infrastructure - positions and committee liaison	STEM is part of introduction at every public-facing event.		How to ensure that all parties are aware of the opportunities for partnership: continuous partnership	1-2-year funding commitments from businesses	Retention (workforce) can be a real focus area
Expand Infrastructure (people, funding, etc.)	STEM festival. CWS and baseball analytics				Connections to DOL, NDE, with focused efforts
Committee chairs as paid positions	New collaborative advising advising with team (developing teams for advising)				

Underlying Blocks

"What is currently blocking our achievement of this vision?"

The team is instructed to not use the words "lack of". An example to illustrate the intent of this discussion was watering flowers. The process of analyzing underlying blocks does not involve solving isolated problems, but in identifying the root causes of many surface issues. It is like watering flowers when you have "lack of" water. When you have "lack of" water you could give up your effort of watering the flowers or you can search and find the underlying block to lack of water. It may have been a retaining wall block falling on the watering hose and stopping the flow of water or the unpaid bills resulting in the water company turning of the water to your house. In this activity, we are looking for that underlying cause for the symptoms being experienced in your organization. Below is the table of underlying blocks the team developed – without using the words "lack of".

Table 3. Underlying Blocks per Practical Vision Elements

PV1: Build Strong Infrastructure & Capacity to Support Mission to Impact	PV2: Advocate for Programs & Innovative Models
▪ **Uncoordinated** – Amongst our education partners – people doing ▪ parallel efforts. Revolving door of interns. ▪ **Missing clarity** – Business partners – understanding the mutual benefits by working together. ▪ **Competition** – Limited resources – funders may choose to fund other initiatives, both in STEM and in other areas. (Especially right now with pandemic and extreme need for services in "front line "support). ▪ **Discouragement** – Volunteer fatigue – reduced engagement and support from committees and volunteers; unrealistic reliance on unpaid volunteers. ▪ **Disjointed** – Volunteer fatigue – revolving door of volunteers. ▪ **Narrow** – Perception – people perceive our mission focus pipeline to employment, but we are more than that.	▪ **Role Clarity** – Driver or partner – partners and stakeholders do not know which role we fill. ▪ **Sporadic** – Events – we don't have a system for planning events. ▪ **Uninformed or Unclear Expectations** – Collective Impact – The community may not understand OSE's model of being a backbone in a collective impact. ▪ **Uncoordinated/Reluctance** – Implementation – OSE's model is not embraced by all program providers or there are problems in implementation. ▪ **Discouraged or Disjointed** – Volunteer Committee Chairs – over reliance on volunteer chairs to lead and assist in implementation.

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Underlying Blocks - Continued

PV3: Expand Evidence-Driven Research, Assessments, & Outcomes

- **Differing** – Vocabulary – different sectors are trained with different words but often talking about the same thing.
- **Disjointed** – Outcomes – how do you define success in STEM? Each stakeholder defines differently.
- **Access** – Data –difficulty in disaggregating large quantities of public data due to shortage of human capital to collect data
- **Fragmented** – Data – districts have different outcomes that they measure and aggregating that across districts (industries) may not be possible.
- **Clarity** – Metrics – what are our metrics we want to measure and capture?
- **Alignment** – Community Partners – how does our data align with other community partners.
- **Fragmented** – Committee – each committee uses data differently.
- **Unclear** – Research approach – unclear research questions, definitions, what to study, what data to use, and even how OSE's efforts impact outcomes.
- **Inaccessible** – Data – cannot get the data we need or want.
- **Uncoordinated** – Efforts – difficult determining who is tracking, and making sense out of the data

PV4: Engage Community through Communication, Collaboration & Connection

- **Fragmented** – Vocabulary – stakeholders have differing definitions.
- **Uncoordinated Efforts** – Committee – we are not sharing what we are doing frequently enough.
- **Outdated Methods** – Social media – using social media strategically.
- **Unclear** – Message – what exactly are we communicating?
- **Missing** – Collaborations – are there stakeholders we are missing, e.g.
- government?
- **Unsustained** – Collaboration – promoting collaboration in between OSE scheduled activities.
- **Committed Resources** – Portal – Implementation and ongoing updating of portal – needs resources
- **Neglected** – Outreach – no one engages with our communications and resources

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Underlying Blocks - Continued

PV5: Diversify Funding to Assure Financial Sustainability

- **Unbalanced** – Funding sources – UNO and Zoo supports, and the buck stops here. Have some founders are strong contributors but the wider membership does not generate revenue.
- **Redirect** – Serving as middle person to move funds to support interns to help support the pipeline.
- **Unclear** – Funding plan – diverse funding plan needed
- **Reluctant** – Potential funders – clear value and motivation for donating to OSE. Discouraged to fund if outcomes are not clear
- **Nonexistent** – Infrastructure – Julie is OSE! Need an established
- business plan, staff, etc.
- **Perception –** Bias – OSE is not its own 501(c)3. Why would companies
- fund UNO or the zoo?

PV6: Grow Community Development, Recruitment & Retention

- **Unclear** – Collaboration – It is sometimes unclear about what is the best way to work with the OSE, etc.
- **Overlapping** – Competing – Ideas and initiatives overlapping with others (Omaha Chamber's, etc)
- **Disorganized** – Impact – how much (or how can we) contribution should we make for "reversal of brain drain"?
- **Uncoordinated** – Messaging – need a clear message of future impact on community to get community and government buy-in.
- **Disjointed** – Efforts – even within OSE, various committees working but
- not aware of other committee work.

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Strategic Directions

Our Strategic Directions are …

Building Sustainability to Increase Impact

Expanding Communication to Elevate Collaboration

Measuring Impact to Ensure Progress

The team was asked to consider what actions they could take to best address the identified underlying blocks. These actions will lead to the strategic directions that OSE will address over the next three years. We began this discussion by answering the question, **"What innovative, substantial actions can deal with the obstacles and move us toward our vision?"**

This part of the workshop included participants working by themselves in silence, sharing in small groups and using the work of the small group to develop consensus around the question with the whole group. Once the actions were identified by the group, the participants grouped the actions and identified the common directions the actions will drive. Each group was given a strategic direction title. The three strategic directions are:

Strategic Directions - Continued

Table 4. Strategic Directions Consensus Building

Strategic Directions

Infrastructure, human capital, organizational structure

- Develop a clear purpose & direction for volunteers.
- Create clear job descriptions for each position; define positions needed to make OSE stand on its own.
- Hire support for the Director.
- Build infrastructure by a hiring staff Assistant.
- Appoint committee chairs give them a stipend.

Business Model

- Business plan
- Shared Goals – OSE should have 3 to 5 main goals – all Committees work to meet the main goals
- Develop financial plan that includes revenue generating programs/services
- The STEM Ecosystem create a set of goals – Outcome Framework – what we support and want to promote
- Pioneering programs – not evaluate – need human capital to build this – certain grants could help with this. Maybe OSE & a partner could help with this

Building Sustainability to Increase Impact

Communication

- What is the Brand? We do have not have a clear ASK based on our brand – How does messaging mapping lead to branding – Language around what we do
- Maintain optimal duration/frequency of communication & contact with all members
- Create a dictionary of our definitions
- Communication plan
- Develop a policy/plan for a clear calendar of events & follow-through on programs
- Create reliability – what gives it validity? Develop a policy/plan for a clear calendar of events to build trust with other organizations
- Follow through & finish the quality STEM programs to be relevant to OSE
- Need a communication plan
- Publish collaborative works
- Communications campaign for demystifying STEM
- OSE became a leader by coordinating/directing city wide event with several partners involved (ex. Nebraska SciFest)

Expansion, diversification communication, engagement

- Diversify and incentivize participation of partners
- Use social network analysis to identify recruitment gaps (SNA) (representation of variety of stakeholders, and to keep them)
- Badges or other stackable recognition for utilizing website content
- Engage partners early and provide tangible benefits

Expanding Communication to Elevate Collaboration

Data & Research

- Coordinate with collaborative data collection partners
- Clearing house for meta-data and collective impact
- Communication campaign for data collection
- Develop virtual conference for data collection – Share what others are doing to create alignment and what's next

Measuring Impact to Ensure Progress

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Strategic Direction One: Building Sustainability to Increase Impact

Goal Strategy Development – Executive Committee

2023 Goals	Research & Analysis	Capacity	Key Performance Indicators	Keys to Successful Implementation
SD1.G1.YR2023. By the end of 2023, OSE will implement a business plan that includes development of a sustainability plan and a robust staffing infrastructure.	▪ Review other non-profit structures ▪ Review items from the National OSE and other local/regional ecosystems ▪ Identify grant opportunities	▪ Will be based on funding, but would encourage keeping a dedicated Director, having a PR/Marketing/ Communications FTE, executive assistant for administrative support, and investigate having an Assistant Director for succession planning	▪ Budget planning (3 years); budget and fundraising goals by 2021 approved by Executive Committee ▪ A sustainability plan is in place by end of 2021. ▪ Dedicated staff added to operations by 2023	▪ Funding: local champions that see the long-term benefit ▪ Continued partnership development and nurturing current partnerships ▪ Staff / committee development and support
SD1.G2.YR2023. By the end of 2023, OSE will operationalize a business plan that includes leveraging community partnerships that diversifies funding sources and processes for contractual obligations.	▪ Further research into 501c3 status (do not necessarily have to be independent but further investigate options within UNO/Zoo partnerships or other non-profits) ▪ Fee structure possibilities: how can the OSE better receive funds and ▪ share funds; increased opportunities for grants; tracking in-kind?	▪ Current capacity: UNO infrastructure for Director of OSE salary ▪ Zoo supports operational funds and location ▪ Minimum needs would be current c a p a c i t y and build larger operational funding sources and process for contractual obligations, further development in fee- based programming	▪ Increased partnerships (documented by new, active) tracking >10% annual growth	▪ Improve clarity in funds and contractual obligations between zoo and UNO and other partners, for various contexts, and future directions ▪ Expand diverse funding options, contracts, and grants. Working closely with ▪ organizations like the Chamber, etc.

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Strategic Direction One: Building Sustainability to Increase Impact

Annual Goals – Executive Committee

2021 Goals	2022 Goals	2023 Goals
SD1.G1.YR2021. By the end of 2021, complete a business plan including an environmental scan performed (expenses, revenue, FTEs, etc.). **By:** Executive Committee	**SD1.G1.YR2022.** By the end of 2022, implement the business plan, revise, and update as needed, and hiring of positions are well underway. Sub goal: By the end of 2022, succession planning parameters and needs will be identified.	**SD1.G1.YR2023.** By the end of 2023, OSE utilize the business plan including development of a robust staffing infrastructure, committee support, and succession planning.
SD1.G2.YR2021. By the end of 2021, identify comprehensive list of partnerships and contracts (current and new) to establish direct funding opportunities within financial planning goals. **By:** Executive Committee	**SD1.G2.YR2022.** By the end of 2022, secure funding resources, fee structure for paid programming/event costs, and contractual relationships (paid or service contracts) based on financial sustainability goals.	**SD1.G2.YR2023.** By the end of 2023, OSE operationalize diverse business plan that includes leveraging community partnerships that diversify funding sources and processes for contractual obligations.

Strategic Direction Two: Expanding Communication to Elevate Collaboration

Goal Strategy Development – Diverse & Engage Stakeholder Committee, Communication Committee & Career Exploration & Pipeline Alignment Committee

2023 Goals	Research & Analysis	Capacity	Key Performance Indicators	Keys to Successful Implementation
SD2.G1.YR2023. By the end of 2023, OSE will implement a concise brand campaign that includes common vocabulary.	▪ Identify internal and external perceptions of our brand. ▪ Determine optimal frequency, modes, and processes.	▪ Determine committee capacity and staff needs.	▪ Common perception of OSE identified by yearly survey. ▪ Implemented communication Plan	▪ Common vocabulary ▪ Clear, concise, and consistent messaging
SD2.G2.YR2023. By the end of 2023, OSE will have engaged all stakeholders.	▪ Define stakeholders and determine the gap between them.	▪ Determine committee capacity, staff needs, and outsourcing.	▪ Hits on website, attendances at events, membership ▪ Define stakeholder gaps filled	▪ Clear plan to increased stakeholders; increase activities on calendar ▪ Clear plan to monitor stakeholder growth and sustainment
SD2.G3.YR2023. By the end of 2023, OSE develop a framework of STEM PK – a career learning continuum.	▪ Identify Framework Model ▪ Inventory resources PK – Career	▪ Determine committee capacity, staff needs, and outsourcing.	▪ Identify stakeholder in each age group ▪ Identify gaps and fill those gaps	▪ Clear plan, and metric to measure growth

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Strategic Direction Two: Expanding Communication to Elevate Collaboration

Annual Goals – Diverse & Engage Stakeholder Committee, Communication Committee & Career Exploration & Pipeline Alignment Committee

2021 Goals	2022 Goals	2023 Goals
SD2.G1. YR2021. By 2021, OSE will determine the optimal brand through internal and external perceptions; and assess the gaps. **By:** Communication Committee	**SD2.G1. YR2022.** By 2022, OSE will align brand perceptions and build strategies to eliminate gaps.	**SD2.G1. YR2023.** By 2023, OSE will implement a concise communication plan.
SD2.G2. YR2021. By 2021, OSE will clarify a model for stakeholder engagement and develop a campaign to connect stakeholders. **By:** D & E Committee	**SD1.G2. YR2022.** By 2022, OSE will launch a campaign to engage stakeholders and assure diversity.	**SD1.G2. YR2023.** By 2023, OSE will enact a system to measure the engagement of all stakeholders.
SD2 G3. YR2021. By 2021, OSE will identify a model for PK- Career STEM Learning Pathway Continuum. **By:** CE&PA Committee	**SD1.G3.YR2022.** By 2022, OSE will develop inventory to PK-Career Continuum and resources to support PK - Career Continuum.	**SD1.G3.YR2023.** By 2023, OSE will identify a clear plan for implementation PK - Career continuum.

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Strategic Direction Three: Measuring Impact to Ensure Progress

Goal Strategy Development – Research & Advocacy

2023 Goals	Research & Analysis	Capacity	Key Performance Indicators	Keys to Successful Implementation
SD3.G1. YR2023. By the end of 2023, OSE will build a data depository (defined as a secured database that users can access and upload data to) on the OSE website. The depository will be tested by a focus group comprised of equal representation from each sector.	▪ Best designs for data depositories ▪ Understanding ease of use and low burden on users ▪ Research models already built that we could adapt (software that people put data into on their own and it automatically populates into a database, like a webapp)	▪ Technical/website design expertise to build a website ▪ Volunteers from sectors willing to test and validate the system	▪ Number of existing software programs reviewed ▪ Selection of method to either implement existing or build our own ▪ Iterative beta tests as it is developed before focus group ▪ Representation of sectors in the focus group ▪ Feedback from focus group, reiterate software, test again	▪ Cost ▪ Access to something we can adopt will be quicker ▪ Building takes time

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Strategic Direction Three: Measuring Impact to Ensure Progress

Goal Strategy Development – Research & Advocacy

2023 Goals	Research & Analysis	Capacity	Key Performance Indicators	Keys to Successful Implementation
SD3.G2. YR2023. By the end of 2023, OSE will implement a common data collection metrics specific for each sector, which will be published and distributed.	▪ Common vocabulary across sectors, what sectors are currently measuring, overall research outcome that we are trying to measure so metrics align	▪ Right people on the committee, additional human capital/grant to fund this	▪ Number of discussions with sectors ▪ Number of relevant data/research papers already published that are reviewed ▪ At least three times review of metric to list to narrow down ▪ Number of sectors that agree with final list ▪ Diversity of sectors and equal representation reported	▪ Assure there is equal representation of sectors, grants to support the human capital to perform focus groups/surveys ▪ Consider virtual roundtables, communication campaign
SD3.G3. YR2023. By the end of 2023, OSE will identify research questions for each sector that lead to one common research outcome to measure the impact of OSE on the Omaha area.	▪ Collective impact research to understand what all sectors defines as success	▪ Getting sectors involved as participants ▪ Researcher to run a collective impact study ▪ Grant	▪ Identify sectors involved and participants from sectors ▪ Successful completion of collective impact research ▪ Interpretation of data from collective impact research	▪ Talent and treasure (people and money) ▪ Common definitions across sectors

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Strategic Direction Three: Measuring Impact to Ensure Progress

Annual Goals – Research & Advocacy

2021 Goals	2022 Goals	2023 Goals
SD2.G1. YR2021. By 2021, OSE review existing software and identified a technical partner to develop a database design. By 2021, OSE will identify funding to support building a data depository. **By:** Research & Advocacy Committee	**SD2.G1. YR2022.** By 2022, OSE will build a data depository (defined as a secured database that users can access and upload data to) on the OSE website.	**SD2.G1. YR2023.** By 2023, OSE will use a focus group comprised of equal representation from each sector to test and iterate the data depository.
SD1.G2. YR2021. By 2021, OSE will publish a "STEM" dictionary. By 2021, OSE will have Identified and recruited partners from each sector to assist with development of metrics. By 2021, OSE will have performed a review of existing published literature and metrics from all sectors. **By:** Research & Advocacy Committee	**SD1.G2. YR2022.** By 2022, OSE will conduct community partnership discussions to identify metrics important to sectors.	**SD1.G2. YR2023.** By 2023, OSE will finalize the metric list and will publish/ Distribute it. By 2023 common, publish data collection metrics specific for each sector By 2023 common, distribute data collection metrics specific for each sector
SD1.G3. YR2021. By 2021, OSE will have developed and published a "STEM" dictionary. By 2021, OSE will have identified and recruited partners from each sector to assist with development of metrics. By 2021, OSE identify a collective impact researcher to lead the project. **By:** Research & Advocacy Committee	**SD1.G3. YR2022.** By 2022, secure funding for the project. By 2022, conduct the collective research impact study.	**SD1.G3. YR2023.** By 2023 identify research questions for each sector that lead to one common research outcome to measure the impact of OSE on the Omaha area.

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Recommendations:

Monitor progress on the strategic directions at the board meetings. Determine if updates should be given in writing and/or verbal updates. Make sure you are discussing the future work and not spending too much time discussing work that is completed. This will keep the Executive Committee engaged in strategic thinking for the future of the organization.

- This should be in both Committee meeting updates and in the Executive Director reports.
- Committees should evaluate year one goals progress, update year two goals to reflect progress and set new2nd year action steps November/December 2021.

During the November/December 2021 Executive Committee meeting celebrate the accomplishments for each strategic direction.

Engage the absent Executive Committee members by reviewing the new strategic plan and ask for their commitment to supporting one or two of the strategic directions.

Ask each Executive Committee member to commit to supporting the implementation in one strategic direction (committee support).

Revisit with each Founding board member about the current strategic plan and get their feedback and ask how they would like their organization to support this important work.

Identify the committee responsible for implementation for each strategic direction, ask them to set regular meetings that would support the success of the annual goals.

> Creativity is thinking up new things. Innovation is doing new things. A powerful new idea can kick around unused for years, not because its merits are not recognized, but because nobody has assumed responsibility for converting it from words to actions. Ideas are useless unless used. The proof of their value is only in their implementation.
>
> *- Theodore Levitt -*

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