

THREE-YEAR STRATEGIC PLAN (2024 – 2026)

October, 2023



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Introduction

In the Fall of 2023, Omaha Stem Ecosystem (OSE) partnered with Parlay Consulting Firm to develop a three-year strategic plan. The executive team and OSE staff participated in two sessions hosted at the Henry Doorly Zoo and Aquarium in Omaha, Nebraska on September 26th and October 3rd.

Parlay uses a modified Technology of Participation (ToP)^{*} method of facilitation for strategic planning. This method encourages the facilitator to remain neutral and engage the participation of the entire group. The lead facilitator for this project was Beth Morrissette, CEO. The strategic planning session(s) began with a series of focused conversations designed to ground participants in the identity and most relevant context of the Omaha STEM Ecosystem's (OSE) progress since their last strategic plan. The session(s) varied from brainstorming to consensus-building, and produced for the organization, a refreshed practical vision, strategic directions, and goals to mark progress on the strategic plan. Strategic planning activities included the following:

- celebrating accomplishments since the last strategic plan
- reviewing the OSE's mission and vision
- acknowledging the progress and changes of the current reality, including internal strengths and weaknesses and external opportunities and challenges;
- reflecting and revising their three-year practical vision to identify elements the OSE's intentions to have progress in the next three years;
- identifying underlying barriers to achieving the practical vision;
- reflecting and revision to the strategic directions that account for the barriers and move the organization forward in achieving the practical vision;
- establishing annual goals; and
- creating a first-year implementation plan with action steps and accountability assignments.

Executive Committee members and staff members present for the strategic planning workshop included: Elizabeth, Tracie, Neal, Deanna, Mike, Tony, Laurie, Cynthia, Julie, Jodie, Ann, Hannah, Julie, Andreia, and Robyn

Strategic Plan Executive Summary

Vision

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

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

Mission

Practical Vision

we will...

Build Capacity that Supports Mission Impact Utilize Evidence-Driven Research & Evaluation to Advance Outcomes Advocate for Community through Intentional Communication, Collaboration, & Connection Ensure Financial Sustainability through Diversified Funding

Strategic Directions

We will achieve the practical vision by ...

		Building Sustainability to Increase Impact		Expanding Communication to Elevate Collaboration		Measuring Impact to Ensure Progress
Year Three Goals	1.	Evaluated, evolved, and established a sustainable nationally recognized organization. Strengthened the statewide collaboration between multiple entities.	1.	Evaluated and enhanced brand awareness of OSE through value propositions for local, state, and national audiences and partners. Operationalized effective internal and external communications strategies.	1.	for assessment of organizations' impact and adjusted.



ACTIVITIES

Celebrating Accomplishments

Leaders discussed recent successes for the organization. Leaders reflected on challenges overcome and lessons learned to inform the future. Notes from this discussion are included in the table below.

Celebrating Recent and Historic Accomplishments						
Successes	 Increase brand recognition – diversify representation in meetings. 					
 Committees leveraged resources and time. 	 A national organization told the Department of Defense to reach out 					
 Connecting and collaborating across sectors increased. 	to OSE.					
 Programmatic planning for the connect series (increase revenue) 	 Learn to prioritize and say no – what matters where to engage. 					
 STEM platform – operationalize / bring together for vision. 	 Doing better at connecting industry, education, and nonprofits. 					
 Ability to fundraise and create stabilize for more staff. 	 Managing budget cycles – calendar and non-calendar 					
 Advocacy – better at our grassroots advocacy. 						
Where have we been strategic?						
 Committee changes – research – variety of perspectives – what is acc 	ountable, what to stop, what to start. Is it valuable to do? How do advocate					
for it?						
 Event – strategic in audience attendance. 						
 STEM Community platform – evolved, listened to the audience, strate 	gic in change/build, what else is out there?					
 Succession planning – now – not when in the moment. 						
 Committees are also set up for succession from members to the next chairs. 						
 Grants – federal and new support. 						
Intentional role clarity and growth to address gaps proactively.						
Partnerships!						

Reviewing the Mission and Vision

Next, the team reviewed OSE's mission and vision statements. These statements serve as a guidepost for strategic planning to help ensure that decisions are aligned with the purpose and intent of the organization. The discussion centered on words and phrases that most resonate, cause anxiety, excite you about the future and which words are missing. The words that are missing could be used for future discussion about the organization's values. Notes from this discussion are included in the table below.

Perspectives on Mission and Vision							
Which words or phrases most resonate with you?							
 STEM Community 	 STEM Community 						
 Connecting 							
 Tomorrow's workforce 							
Robust							
Which words create anxiety?							
 Business and education 							
 Transforming 							
 Excellence 							
STEM							
Which words or phrases excite you for the	future?						
 Community 							
 Education 							
Innovation							
 Transforming 							
 Connecting 							
 Tomorrow's workforce 	 Tomorrow's workforce 						
Which words are missing?	Which words are missing?						
 Access 	 Excite – Engage – Explore 						
 Equity 	 Empower 						
 Awareness 	Pathways						
 Facilitation 	 Discovery 						
 STEM Careers Student / Learners 							

Acknowledging the Current Reality

The team next acknowledged the current reality which they must consider in planning for the future. They reviewed their previous current reality and identified what remains and what is new. Notes from this discussion are included in the table below.

	What are our internal strengths a	and weaknesses as an organization	?
 Strengths Previously Identified (2020) Dedicated volunteers Commitment from Julie & founders Director Business – sponsorship Jointly sponsored (UNO/Zoo) Leadership Creation of investment of business of OSE 	 Strategic planning / meaningful Breadth of what's going on Strong community of volunteers Newly Identified (2023) Connect series (but) Platform Social media Cross committee awareness (Julie) 	Weaknesses Previously Identified (2020) Public awareness Initiatives need to stay focused full-time : support Sustainability planning Budget	 Newly Identified (2023) Geographic footprint/reach Messaging doesn't resonate with multiple target audiences Effectively collaborate with other organizations with similar objectives Platform experience—not tailored Succession planning Onboarding
 Threats Previously Identified (2020) Sustainable funding Lack of focus (mission, vision) Brand recognition Lack of presence at decision-making tables (i.e., policy, Lincoln, etc.) 	 What are our external t Newly Identified (2023) Dedicated and larger staff Stakeholder clarity Inability to represent the 'State' (very localized) MOU's with all partners (what can OSE count on) Competition with volunteers Competition with other STEM organizations. 	 hreats and opportunities? Opportunities Previously Identified (2020) Increase community-based grants / community partner grants Leveraging tech-based companies Leverage workforce development focus Increase conversations with state and local business organizations (Chamber) Collaboration with likeminded organizations (i.e., NE Tech Collaborative) Increase connections with education, business, nonprofits, and government Better quantify ROI 	 Leverage adults looking for different career pathways / realignment Increase opportunities to work across Nebraska Newly Identified (2023) STEM community platform- sustainable funding source Larger "footprint" statewide Hosting a STEM/innovation summit Develop a national presence Direct Learner Advisory Committee—feedback from frontline stakeholders Strengthen Annual Report- quick highlight Impact Report Connect with UNO government liaison

Creating a Three-Year Practical Vision

Leaders then engaged in a thoughtful review of the Practical Vision statements that had been previously established. During this session, they engaged in a meaningful dialogue about the progress made thus far and identified areas that require continued effort. The table below presents the revised Practical Vision statements, accompanied by supplementary points to underscore their significance.

Build Capacity that Supports Mission Impact Utilize Evidence-Driven Research & Evaluation to Advance Outcomes		Advocate for Community through Intentional Communication, Collaboration, & Connection	Ensure Financial Sustainability through Diversified Funding	
 People 	 Utilization 	 Diverse communities 	 Stabilize 	
 Operations 	 Adapt 	 Inclusive & Welcoming 	 Increase 	
 Infrastructure 	 Communicate 	 Promote Outcomes 	 Grow confidence 	

Identifying Underlying Barriers

Next, the team identified potential and/or actual barriers to accomplishing the practical vision elements. While most organizations recognize that financial and human resource capacity limitations are critical to managing toward future growth and direction, it is important to consider what underlies these and to consider other barriers and challenges that might not be as obvious. By considering various environmental or internal challenges, participants are better prepared to illuminate appropriate actions that can drive strategic directions. The team was instructed to avoid the phrase "lack of" in their comments (e.g., "lack of" money or "lack of time") in order to promote reflection on what might underlie the potential challenges and barriers to moving forward. Notes from this discussion are included in the table below.

Underlying Barriers by Practical Vision Element						
Build Capacity that Supports Mission Impact	Utilize Evidence-Driven Research & Evaluation to Advance Outcomes					
 Unclear – Succession plan 	 Extensive – time consuming for recycling content for analysis 					
 Excessive – responsibilities, a lot of demand responsibilities 	 Unrealistic – were full in priority 					
 Restricted - funding 	 Unclear – outcomes 					
 Unclear – structure & roles and responsibilities needed 	 Unclear – sources, identify, keep goals moving 					
 Excessive – reach lower landscapes of STEM 	 Unclear – understanding how ecosystem connects to them and how we 					
 Silo/unclear/disjointed – committee connections to other 	connect with external stakeholders, partners.					
committees	 Disorganized – communication, external/internal 					
 Conflicting- objectives impact with committees 	 Unclear – structure/process 					
 Competition – for volunteers 	 Unmotivated – stakeholders to complete survey 					
Advocate for Community through Intentional Communication,	Ensure Financial Sustainability through diversified funding					
Collaboration, & Connection	Liisure Financial Sustainability through diversified funding					
 Unclear – structure/process 	 Reluctant – People don't know about us. 					
 Unrealistic – methods to reach all communities to advocate 	 Conflicting – we are so broad. What will they support. Different types of 					
 Competing – events, competing in so many different things 	organizations.					
 Confusing – how is this all going to happen 	 Restricted – capacity/resources to consistently apply for grants 					
 Confusion/ Unknown - hard to build brand 	 Restricted – funding sources 					
 Unclear – benchmarks that tell value of OSE 	 Excessive – a lot of nonprofits 					
 Unclear – what you can do for me (ROI), value proposition 	 Confusing – other STEM entities 					
 Narrow – there is more out there – cool jobs out there not 	 Reluctant – coming together with other STEM 					
connected to OSE	 Unclear – Paths to diversification 					
Unclear/Disjointed/Overlapping – who is stakeholder? Overlapping	 Unclear/Restricted/Confusing – who funding? ZOO, UNO, OSE within 					
interests in OSE	confusions how works					
	 Insecurity – Within Zoo and UNO for advocacy 					
	 Fragmented – funding/operational structure 					

Setting Strategic Directions

Next, leaders brainstormed potential action steps that account for the underlying barriers and could move OSE toward accomplishing its practical vision. The actions were grouped by strategic focus areas that nonprofit organizations typically prioritize in their work. Then leaders refined and renamed the priority areas to better reflect the intent of the ideas and actions. The strategic directions for the next three years are:

- Building Sustainability to Increase Impact
- Expanding Communication to Elevate Collaboration
- Measuring Impact to Ensure Progress

SD1: Building Sustainability to Increase Impact	
OSE volunteer recognition and recruitment	 Evaluatue capacity needed to support mission
Identify the head of the horse (legal, MOU, Role, Succession and money)	 Formalize roles and internal process (paid staff)
Evaluate committee structure & objectives	 Idenitfy our product
Mission alignment of committees	 Identify MOU's
Succession planning	 Develop grant development strategy
 Works strategically with statewide partners to push platform 	
5D2: Expanding Communication to Elevate Collaboration	
Integrate OSE website and SCP	 External value proposition to stakeholders (who?)
 Onboarding for volunteers, co-chair and chairs 	 Increase communication within OSE
Create an OSE tag line	 Conduct periodic review of research sharing
Add tagline to the website	 Revitalize communications & Marketing plan
Internal knowledge sharing committees/boards	 Identify 1-2 STEM organizational partnerships
 Create and communication value proposition (the why) 	
5D3: Measuring Impact to Ensure Progress	
Identify Top 5 KPI's (include platform)	
 Develop benchmarks to measure progress (include platform) 	
Social return/value of OSE	

Establishing Annual Goals

Leaders next developed annual goals for each year of the strategic plan. Those goals are documented in the tables below for each strategic direction.

	Year One Goals 2024	Year Two Goals 2025	Year Three Goals 2026
	B	uilding Sustainability to Increase Imp	pact
SD •	1.G1.Yr.1 Identified and selected operating model for OSE 2.0 and begun implementing leadership to support OSE 2.0 model.	 SD1.G1.Yr.2 Evaluated and begun implementation of capacity needs to support growth and change management throughout the organization. 	 SD1.G1.Yr.3 Evaluated, evolved, and established a sustainable nationally recognized organization.
SD =	1.G2.Yr.1 Evaluated organizational structure in regards to talent and financial resources to diversify and strengthen operational capacity.	 SD1.G2.Yr.2 Implemented learnings and strategies to improve operational capacity. 	 SD1.G2.Yr.3 Strengthened the statewide collaboration between multiple entities.
	Expand	ling Communication to Elevate Colla	aboration
SD.	2.G1.Yr.1 Crafted and articulated value proposition for local, state, and national impact.	 SD2.G1.Yr.2 Aligned and communicated OSE's 2.0 model to ensure progress toward its value proposition. 	 SD2.G1.Yr.3 Evaluated and enhanced brand awareness of OSE through value propositions for local, state, and national audiences and partners.
SD •	2.G2.Yr.1 Revitalized internal and external communication plan and marketing strategies.	 SD2.G2.Yr.2 Monitored and adapted to communications plan and marketing strategies. 	 SD2.G2.Yr.3 Operationalized effective internal and external communications strategies.
		Measuring Impact to Ensure Progre	SS
SD.	3.G1.Yr.1 Identified and tracked benchmarks to inform continued growth beyond Omaha.	 SD3.G1.Yr.2 Analyzed benchmarks to inform adjustment for continued progress beyond Omaha for strategic growth. 	 SD3.G1.Yr.3 Reflected on the progress of benchmarks for assessment of organizations' impact and adjusted.
SD	3.G2.Yr.1	SD3.G2.Yr.2	SD3.G2.Yr.3
	Identified and shared research studies for the advancement of STEM in education, business, nonprofits, government, policy makers, etc. Secured resources and began Social Value of Investment study (SVOI).	 Disseminated and leveraged learnings from research studies for the advancement of STEM in education, business, nonprofits, government, policy makers, etc. Completed and reflected on learnings and next steps of completed SVOI study. 	 Evaluated the utilization of research studies distributed by OSE for the advancement of STEM in education, business, nonprofits, government, policy makers, etc.

Planning for Year One Implementation Plan

Finally, leaders developed implementation plans to identify quarterly action steps they can take to make progress on their year one goals. For each, they indicated the individual (by role) and/or team that is responsible for ensuring the completion of the steps. The first-year implementation plan with accountability assignments is documented in the table below for each strategic direction.

Year One Goals	QTR 1	QTR 2	QTR 3	QTR 4				
Building Sustainability to Increase Impact								
 SD1.G1.Yr.1 Identified and selected operating model for OSE 2.0 and begun implementing leadership to support OSE 2.0 model. 	 Executive committee drafts high-level proposal. (By JS/Ex team) Pitch proposal to top three potential owners (By JS/Ex team) 	 ✓ Solidify agreement and all necessary paperwork. (By JS/Ex team) ✓ Work with the communications team for rebrand and announcement (By JS/Ex team) 	✓ Begin work on Goal 2	✓ No action				
 SD1.G2.Yr.1 Evaluated organizational structure in regards to talent and financial resources to diversify and strengthen operational capacity. 	 ✓ N/A until primary owner identified 	 ✓ N/A until primary owner identified 	 ✓ Follow primary owner organizational structure. (By JS/Ex team) ✓ Create clear roles and responsibilities. (By JS/Ex team) ✓ re-evaluate operational committees (By JS/Ex team) 	 Have operational process and procedures in place. (By JS/Ex team) 				
	Expanding Com	munication to Elevate	Collaboration					
 SD2.G1.Yr.1 Crafted and articulated value proposition for local, state, and national impact. 	 ✓ Identify stakeholders and how intersect (By RL) ✓ Develop survey to help with value proposition/focus groups (By RL) 	 ✓ Review all survey data (By RL) ✓ Draft Value Proposition (By RL) 	 ✓ Test value Proposition via concepting (By RL) 	 ✓ Craft materials reflecting value proposition. (By RL) ✓ Start to integrate into messaging (By RL) 				
 SD2.G2.Yr.1 Revitalized internal and external communication plan and marketing strategies. 	 ✓ Organize repository, access (By RL) ✓ Co-chair meeting evaluate current stakeholders (By RL) ✓ Formulate governance (By RL) 	 ✓ Define purpose and roles (By RL) ✓ Present structure (By RL) ✓ Solidify goals (By RL) 	 ✓ Onsite onboarding (By RL) ✓ Identify gaps (By RL) 	✓ No action				

Planning for Implementation (continued)

Year One Goals	QTR 1	QTR 2	QTR 3	QTR 4				
Measure Impact & Ensure Progress								
 SD3.G1.Yr.1 Identified and tracked benchmarks to inform continued growth beyond Omaha. 	 ✓ Identify which benchmarks to prioritize for SCP, OSE, STEM Connect series. (By Executive Committee) ✓ Set benchmarks for prioritized benchmarks, SCP, OSE, STEM Connect series. (By Executive Committee) 	 Cultivate data needed to measure progress on benchmarks. (By OSECC) 	 Collect data needed to measure progress on benchmarks. (By OSECC) 	 Collect, analyze and communicate progress on 2024 benchmarks (By OSECC & Communications Committee) 				
 SD3.G2.Yr.1 Identified and shared research studies for the advancement of STEM in education, business, nonprofits, government, policy makers, etc. Secured resources and began Social Value of Investment study (SVOI). 	 Identify potential candidates. (By JS & TER) Resources needed to support potential candidate (By JS & NG) 	 ✓ Secure potential candidate (By JS & TER) ✓ Secure resources needed to support potential candidate (By JS & NG) ✓ Identify data needed for SVOL (By Executive Committee) 	 ✓ Support candidate work (By JS & TER) ✓ Begin work on SVOL document (By Doc candidate) ✓ Collate data needed for SVOL (By JS, TER & Doc candidate) 	 ✓ Continue to support candidates work (By JS & TER) ✓ Continue to work on SVOL (By Doc candidate) 				

Hope is the belief that the future can be better than the present

and that we have the power to make it so.

-Dr. Shane J. Lopez (Making Hope Happen)