How Omahans describe Omaha:

[Word cloud image]

How patrons describe OPL:

[Word cloud image]
Table of Contents

Section | Page
---|---
1. Executive Summary | 3
2. Strategy | 7
3. Key Concepts
   - Essentiality and the OPL Brand | 11
   - Business Principles and Practices | 12
   - Market Segmentation | 15
   - Facilities Master Plan | 19
4. Strategic Service Model | 21
5. Organizational Innovation
   - Core Values | 31
   - Organizational Advancement | 31
6. Strategic Goals and Objectives
   - Nexus | 38
   - Long Reach | 45
7. Timeframe | 49

Appendix Content | 51
Lexicon | 53
Endnotes | 59

How staff describe OPL:
Executive Summary

Strategy

Omaha Public Library (OPL) has identified its strategic imperative and developed two core strategies that address the needs discovered. Analytics revealed:

- **Omaha needs a Nexus to create greater positive impact through community collaboration**
- **OPL needs to extend its reach and serve even more people in its communities**

**Nexus** places OPL in fundamental, strategic support of the myriad organizations that are focused on resolving underlying issues in Omaha.

OPL will serve to connect Omaha’s public, private and nonprofit organizations, and citizens who strive to create a better Omaha. It will be the public sphere intersection for organizations and individuals to converge and address compelling issues. As a catalyst and collaborator, OPL will proactively engage these social advocates and strategically support coordinated efforts.

**Long Reach** is an enhancement of a typical public library method for attracting patrons: identifying needs, developing resources, and providing services that address the needs. The Long Reach strategy uses market segmentation to better understand the lifestyles and lifestages of people in OPL’s communities, and to grow the number and diversity of patrons by reaching niche interests, individuals and groups.

Nexus and Long Reach work in tandem — each supports the other.

- Strategic alliances offer introductions to their service populations, creating new OPL patrons
- Long Reach patrons discover organizations that can help them with their issues
- OPL resource allocations to either core strategy can be leveraged to achieve both goals

Key Concepts

The strategic plan is based upon integration of key concepts discovered and identified as critical during the analytics and strategy phases of the planning process:

- **Essentiality and the OPL Brand**
  Patrons and communities will recognize the value of OPL as an outcome of core strategy implementation, resulting in the perception of OPL as essential to its ecosystem.

- **Business Principles and Practices**
  OPL’s integration of private practices into its work will generate a process orientation and development of project management proficiencies that leverage people and resources to achieve the new purpose as evidenced through sophisticated performance measurements.

- **Market Segmentation**
  Utilization of this analytics and business intelligence tool is being pioneered by OPL and few other public libraries, and offers a rich understanding of the demographics, lifestyles, lifestages and values of patrons. Key findings and recommendations for OPL are highlighted in this section.

- **Alignment of Facilities Master Plan**
  Reaching patrons requires place—whether physical or virtual. Creation of a comprehensive but fluid capital improvement program will give OPL the ability to prioritize facility investments through core strategies.

These concepts, when integrated and addressed in OPL’s leadership perspective, relationships, service delivery, and operations, will create capacity to achieve the Nexus and Long Reach core strategies.
Strategic Service Model

A service model represents how a library is organized to deliver services. OPL is evolving a new service model that is forward thinking and anticipatory, with a compelling, future-focused perspective that will evolve and achieve OPL’s core strategies. The model is composed of four elements:

- Strategy
- Relationships
- Service Core
- Service Delivery

The model is not an organizational chart and does not represent specific people but rather functions within OPL. People and communities located at the top of the diagram serve as a clear message that patrons and communities are OPL’s primary reason for being.

This diagram places strategy in the driver’s seat, from which relationships are determined and nurtured. These relationships, with patrons, strategic alliances, communities, and the media, are the connections and feedback loops that will determine the services provided.

The individual service core components are not represented in the larger diagram, but comprise the system’s operations that are indispensible to service delivery.

At the top of the diagram is the service delivery element, representing both physical and virtual points of interaction between patrons, communities, and OPL.

Each element of the new model, above, is explained in detail in Section 4.

Organizational Innovation

The new strategic direction represents a significant shift from existing conditions and promises to be transformational for Omaha and OPL. A new purpose and vision are emerging, and OPL is reinventing and innovating itself toward success.

As a foundation to the new purpose and vision, OPL is undertaking an inclusive staff process to craft guiding principles. Guiding principles are beliefs, promises and expectations, and will be communicated to staff, patrons, strategic alliances, partners, and communities served through OPL’s core values, service philosophies, and core competencies.

OPL has an opportunity to transform the organization and redefine what the Library is and does in Omaha. This transformation must be intentionally designed and implemented. It is essential that the organization is ready to successfully execute the Nexus and Long Reach core strategies. Immediate next steps outlined in Section 5 include:

- staff development and creating organizational capacity
- developing or refining service core elements
Strategic Goals and Objectives

**Nexus:** Omaha will resolve underlying issues that jeopardize both quality of life and vitality of the City with OPL as an essential catalyst, collaborator and connector utilizing a megacommunity approach.

**Long Reach:** 100 percent of OPL’s service population will realize the return on their investment and recognize the positive impact from Library services in Omaha.

Goals are statements about benefit and value to those served and objectives describe how OPL will achieve the goal. The Nexus goal positions OPL as an integral element in facilitating community collaboration where all of Omaha benefits, and the Long Reach goal specifically focuses on the service population of the Library.

Objectives and actions are outlined with preliminary, proposed performance measurements in Section 6.

**Timeframe**

A schedule of activities, organized to represent a critical path for effective implementation of core strategies, is included in Section 7. This will become a living document, continually adapted and revised by OPL to address communities’ priorities and emerging opportunities.

**Appendix Content, Lexicon and Endnotes**

The content of the appendix, a separate document, is identified in this section and includes:

- CivicTechnologies’ OPL Library Use Study and market segmentation report
- research material
- outreach memoranda
- other information developed in, or supplemental to, the strategic planning process

Terms used in the document that might be unfamiliar or require context are marked by an □ and are defined or elaborated upon in the Lexicon.

Throughout the text, citations for other works are identified with sequential numbers and located in the last section, Endnotes.
Strategic Plan | 2011

Strategy

OPL has identified its strategic imperative and developed two core strategies that address the discovered needs. Analytics revealed:

- **Omaha needs a Nexus to create greater positive impact through community collaboration**
- **OPL needs to extend its reach and serve more people in its communities**

Two key areas where OPL can create a significant impact are 1) connecting and supporting the many organizations attempting to resolve Omaha’s issues; and 2) serving more individuals and families in their lifestyles throughout lifestages.

Omaha is experiencing exciting growth in economic development, investments and urban renewal, and the world is learning what Omahans have known all along about the greatness of their city. These successes are celebrated, but there is recognition that issues stand between Omaha and excellence. These issues include the City’s socioeconomic divide, struggles with inclusiveness, community and civic engagement, leadership development, and future growth and infrastructure needs. There are great organizations in Omaha working hard to eradicate these issues and OPL intends to help.

OPL’s service area has about one-half million people, and half of them have a Library card—the key to opening their worlds. OPL is aiming higher and is committed to doing the work to reach the portion of the City’s population that have yet to discover what OPL has to offer.

The strategic direction revealing itself is exciting, and promises to be transformational for both Omaha and OPL. The core strategies, implemented successfully, will position OPL in the place of greatest reach and highest perceived value.

OPL has a talented staff with specialized knowledge and information expertise. Continued development of service excellence, intellectual curiosity and creative intelligence in current staff, and actively recruiting future staff with these qualities will drive OPL forward. Continual improvement in organizational and individual core competencies and proficiencies will serve Omaha on its way to excellence.

OPL intends to bring the best of private sector practices into its business, and embed processes in the organization that ensure the quality of service and relationships. OPL must and will continually adapt to changing community contexts and anticipate emerging service needs.
Nexus

The Nexus strategy places OPL in fundamental, strategic support of the myriad organizations that are focused on resolving underlying issues in Omaha. These issues threaten to jeopardize Omaha’s quality of life and vitality in continued growth and development.

OPL will serve as an essential connection with and between Omaha’s public, private and nonprofit organizations and citizens. OPL will be the public sphere intersection to deliberately join these organizations and individuals together to address compelling issues of mutual importance for Omaha. Employing a set of practices and principles that will facilitate all in achieving results, OPL will act as catalyst and collaborator and will proactively engage and strategically support these organizations. Using a megacommunity approach, and with targeted use of its unique expertise, competencies and resources, OPL can help them build a better Omaha.

Strategy Map

OPL will offer to first facilitate the gathering of all organizations to create a comprehensive community agenda and priorities, and to understand who is working in each issue space. With priorities established, OPL will facilitate the efforts in specific focus areas and explore opportunities for robust collaborations and coordination. Minimizing duplicate efforts, and allowing each organization to play to its strengths, can create even greater positive impacts with the same resources. OPL can provide support to the efforts through expertise, content and use of facilities.

OPL, in alliance with other experts, can also support these efforts by compiling reporting on impact measures provided by organizations to create a communitywide picture of the results of collaborative efforts in each focus area. With quantitative datasets and GIS technologies, qualitative and quantitative performance measurements in various focus areas will layer upon each other to represent the interrelationships and collateral benefits of activities. This data will geographically represent how these coalitions are gradually moving the needle on the most critical quality of life and equity issues in Omaha.

- Socioeconomic divide
- Community and civic engagement
- Inclusiveness and leadership development
- Growth and infrastructure needs
Long Reach

Long Reach is an enhancement of a typical public library method for identifying needs, developing resources and services that address them, and attracting patrons to the Library. Libraries gain patrons, often one at a time, by communicating what they can offer to individuals and families. In many communities, the majority of library use is in early childhood literacy, popular materials and educational support.

The added element in the Long Reach strategy is the use of market segmentation to better understand the lifestyles and lifestages of people in OPL’s communities, and to grow the number of patrons by reaching niche interests, individuals and groups by tailoring its offerings to attract these future patrons to the Library. Without diminishing the popular, literacy and educational offerings, OPL can expand its experiences, content and services to a wider audience both physically and virtually.

Strategy Map

Long Reach is based upon the Long Tail\(^1\) theory of retail sales that the majority of sales are the generic or most popular items. However, the more specific, or niche interest items (the dinosaur’s tail) actually represent the same or greater potential sales volume when graphed.

Capturing the niche market is harder for bricks and mortar retail, as they rely on massive sales of a few select items due to space constraints. Companies like Netflix and Amazon can stock or source just a few of many more items because of its different product delivery model. Libraries have a similar model, supported by shared and floating collections, interlibrary loans and intra-library deliveries, and eResources. This image from the article, “Chasing the Long Tail”\(^2\) illustrates the concept.

The Long Reach strategy is an extension of the strategy OPL has always used, albeit without the market segmentation technology and a process for both retaining existing and creating new patrons. In achieving a Long Reach, OPL is essentially introducing an individual or small group to the Library, capturing their interest, and amazing them with the service and expertise provided. Implementing the Long Reach strategy will make it easier to find non-cardholders, engage them in their areas of interest, and create another patron and Library advocate.
Connectivity Diagram

The core strategies are interconnected as shown below, and together will grow the number of individuals and families served as well as provide greater value to communities. The connectivity diagram represents the interrelationships of activities and impacts achieved in both strategies, with the issue of community engagement at its center.

Nexus and Long Reach will work in tandem—each supporting the other:

- Strategic alliances offer introductions to their service populations, creating new OPL patrons
- Long Reach patrons discover community service organizations they might not be aware of that can help them with individual issues
- OPL resource allocations to either core strategy can be leveraged to achieve the both goals
- Patrons discover opportunities for volunteerism when inspired by all that OPL is accomplishing
- OPL is a Nexus in the larger community, and branches become a Nexus in their neighborhoods
Key Concepts

The strategic plan is based upon integration of key concepts discovered and identified as critical during the analytics and strategy phases of the planning process:

- Essentiality and the OPL brand
- Business principles and practices
- Market segmentation
- Alignment of Facilities Master Plan

These concepts, when integrated into and addressed within OPL’s leadership perspective, relationships, service delivery and operations, will create capacity to achieve the Nexus and Long Reach core strategies. They are introduced here to provide context in explanation of the new strategic service model’s elements in Section 4.

Essentiality and the OPL Brand

OPL discovered in its initial opportunity analysis that the basic issues were the sustainability of the organization as an institution and improvement of communities’ quality of life.

Staff, concerned about funding and community support, and questioning the future of libraries in general, wondered whether OPL would still exist in years to come. In insight interviews, community leaders expressed concern that unless Omaha addressed its underlying and emerging issues, it was in danger of losing progress it had made and might regress to a poorer quality of life with fewer opportunities.

Sustainability was the word used by most to describe these concerns—discussed in terms of not losing what they have in OPL, or not letting issues stagnate Omaha’s growth. Sustainability can be viewed as the point at which the sum total of actions has zero impact on an ecosystem. Being sustainable results in status quo. OPL and Omaha are aiming higher.

Beyond sustainability, the concept of regeneration refers to contributions made beyond the net consumption-use equation, contributing to a more robust ecosystem. OPL’s new core strategies embody the concepts of regeneration; simply stated - leaving the world a better place.

OPL realizes that the problem definition is not really sustainability—the current state is not the long-term goal. The problem statement includes underutilization and perceived value in the communities served, and the solution is to achieve essentiality. OPL must provide even greater value to patrons and communities, and become critical to its ecosystem.

A related, interesting revelation from the analytics effort in the strategic planning process was that even though OPL has existed for over 150 years, and recently developed and implemented a new brand, patrons continue to recognize and have affinity for a branch or branches than the organization as a whole. Historically, fewer relationships with partners are held by the administration at OPL than by individuals at neighborhood branches.

Critical to the Nexus core strategy is the concept of relationships between organizations, which must be embedded in both organizations’ structure and woven into the documentation, processes and position responsibilities independent of people. Whomever the people, and whatever their tenure, the relationship continues to exist.

Many of the service model innovations and leadership goals are focused on organizational consistency, staff and patron alignment to the OPL system as more important than to their branch, and everyone’s perception of OPL as a strong and essential entity in Omaha.
Business Principles and Practices

Libraries are public agencies with associated cultures and operational practices. OPL is poised to lead a change. As the original social entrepreneurs, libraries transform lives. The differentiator for social as opposed to other entrepreneurship is the integration of private sector, profit motivated practices to produce successful outcomes in nonprofit ventures. In the public sector, profit realized is then distributed to shareholders (taxpayers) through reinvestment in the organization to create even greater impacts.

OPL will continue to integrate the best-in-class private sector practices into its business, and embed processes in its organizational structure that ensure the quality of service and relationships. It must continually adapt to changing community contexts and anticipate new service needs. The resulting quality and consistency in the experiences, as perceived by patrons and strategic alliances, will also enhance the communities’ recognition and acknowledgement of organizational identity and value.

The Work of Libraries

Public libraries can be viewed as professional services firms. Looking to this realm is the most relevant and simplest way for OPL to embed private sector best practices and profit (impact) mindedness in its strategy and operations.

Ronald Hiefitz introduced the concepts of situational work, an excellent framework for shifting mental models and changing culture in public sector work. Hiefitz organizes work into three situational types: technical, technical and adaptive, and adaptive. In Type I, technical work, the problem is clearly identified and proven solutions exist – one just needs an accomplished or expert individual to apply the solution to the problem. In Type II, technical and adaptive work, the problem is clear but the solution may require learning or change because it is not as clear-cut as in technical work. The person with the problem and whoever can apply a solution must work together. Type III work is adaptive, where both the problem and its solution requires learning for all involved as the problems are not clear-cut and the fixes are not technical. Learning is required for both the problem definition and development of the solution, as well as its implementation. This is extremely collaborative and situation specific work.

The chart to the left illustrates four different professional services models (one to a quadrant). OPL can adapt relevant professional services practices to its operations and service delivery, effectively blending private sector business innovations into public sector service.

OPL’s domain of expertise (Y axis) is definitely in content and the Library is perceived as a trusted expert. OPL’s service delivery model (X axis) will be knowledge-based, outcome facilitation through implementation of both the Nexus and Long Reach core strategies.

The highest value proposition is in the upper right hand quadrant and utilizes a core competency of OPL—knowledge and content expertise in collaborating with patrons and alliances to create solutions.

Integrating concepts of business principles and practice will position OPL for success in its new strategic direction. The Nexus and Long Reach core strategies will involve adaptive work and delivering collaborative solutions. All staff will need to recognize the type of technical to adaptive work that must be done to best serve patrons and alliances in each situation and respond accordingly.

Embedding the following principles of practice are critical to advancing OPL and implementing the strategic plan:

- Purpose, people and process
- Leverage and lean thinking
- Performance measurement
Purpose, Process and People

Where organizations once talked about strategy, structure and systems to describe how they were designed to deliver their value, they have recently begun to realize that the concepts of purpose, process and people are more applicable (and human) in nature.

OPL must adopt a process orientation that provides foundation for creativity and innovation, and requires organizational compliance. Where processes exist, they can be evaluated, improved or even abandoned if and when it’s the best course. Where processes do not exist, they are daily being invented and reinvented.

Integrating both a purpose orientation and a project management competency into OPL will be key to organizational advancement. Process planning and design is different from project planning and management, but both are fundamental to efficient and effective work.

In both core strategies, staff will collaborate across the organization on a much broader scale. Where libraries are hierarchical by nature, OPL should explore the matrix organizational concept. Dynamic and cross-functional staff collaboration will be vital and operate independently of the reporting structures in place. Individual team members will need to be held accountable to team goals and performance measures, regardless of supervision and reporting structure.

Every important process must have people responsible for evaluation of the value of activities, value to core strategies, and opportunities for continuous improvement where possible. In addition, every project must have leadership, management, performance measures and accountability.

Leverage and Lean Thinking

Lean organizations maximize value and minimize waste. Incorporating lean thinking into OPL’s culture will enhance its ability to use leverage to generate additional capacity within current revenue circumstances.

The concept of leverage has many aspects, but basically can be thought of as the use of levers (like toolbars) to create greater strength or power and to accomplish more with the same resources or effort.

*Give me a lever long enough and a fulcrum on which to place it, and I shall move the world.* - Archimedes

The private sector has expanded the leverage concept to operational efforts. The concept applies to having the right people doing the right things—CEOs should not spend their (very expensive) time making copies. For products and services, intentional design and a little extra effort may produce something that can be distributed, duplicated or streamlined.

Lean thinking and leverage used in new staffing models, program and service development, organizational processes and service delivery processes will ultimately generate the excess capacity to deliver the core strategies. Demonstrating successes rather than arguing need to make the case for additional funding is a much more powerful position in future budget cycles and grant requests.
Performance Measurements

Quantitative Measurements

Library usage statistics are the foundation of conventional and widely used approaches to performance measurements. Traditionally, the following three measures have dominated:

- People served (total number or unique number served)
- How well the service meets needs (opinion of quality, value and satisfaction)
- Units of service provided (number of actual transactions – circulation, reference)

Usage statistics are vital in the business intelligence realm of determining returns on investment (ROI) and productivity. Statistics are quantitative and are useful for comparative analysis over time. These can easily be calculated for cost-effectiveness (initial and ongoing costs and savings relative to the current condition) and, therefore, the ROI.

Qualitative Measurements

Outcome measurements have recently made their way into libraries. Outcomes indicate impacts, which reveal a change in condition or a difference made. Impact measures are also referred to as community indicators, which describe specific issues and their role in the overall quality of life in an area. These measures are more qualitative and, therefore, may be more difficult to articulate and also to show a definitive correlation to the actions of the Library. However, they play a powerful role in communicating the value of Library services.

Cost-effectiveness analyses are simple equations that determine the return on any investment:

\[
\text{Savings or new revenue from investment - Cost of investment} = \text{Effectiveness of investment}
\]

Coupling quantitative and qualitative measurements requires a step beyond cost-effectiveness analyses, as the intangible aspect has to be addressed. This more comprehensive type of analysis is described as cost-benefit. In addition to the cost and benefits included in the conventional cost-effectiveness analysis above, intangible benefits and the concept of return on investments over a period of time are factored into the equation. Identifying the value of intangible benefits is subjective, which requires an assignment of value that may be more difficult to defend or correlate directly to the investment.

Beyond the dual use of quantitative and qualitative measures, OPL could locally pioneer the use of Triple Bottom Line (TBL) accounting. In using TBL, forward thinking governments and private practices embrace a larger responsibility for their actions beyond direct accountability to taxpayers and shareholders. This could position Omaha in the forefront of communitywide, holistic performance measurements that use three related frameworks:

- people, planet and prosperity
- economy, environment and equity
- economic, social and ecological responsibility

Rather than accounting only for financial performance, an organization also includes reporting on its social and environmental performance. The organizational picture is broadened to include impact to the quality of life for people in its communities, as well as the impact to the quality of the environment.

Libraries are well versed in accounting for inputs and outputs, but many do not explore the outcomes and efficiencies. Blending cost-benefit and TBL practices is a powerful way to truly understand the Library’s impact in the community—something constantly sought as way to communicate the value and relevance of libraries.
Market Segmentation

The analytics phase of the planning process included a Library Use Study with a market segmentation analysis developed by CivicTechnologies. Market research is a pioneering activity in public libraries, but is commonplace in the businesses realm in service and product development. This report is vital to the implementation of both core strategies. The full report is included in the Appendix to the Strategic Plan (refer to Appendix Contents at the end of this document).

**Following is an excerpt of the executive summary from the full report.**

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**Introduction**

The purpose of the marketing segment report is to support and inform the Library’s strategic planning process. This report integrates diverse data sets to derive insights into Library use and market segmentation patterns.

This approach provides reasoning for sound and defensible decisions. Information in this report can be used by the Library to deliver more effective and relevant services that meet community needs, foster community connections, support marketing and outreach efforts including other organizations, sustain education and learning, and support economic development.

The following are key elements of this study:

1. Discern and characterize Library use patterns
2. Adjust service area boundaries to be consistent with usage and census block group boundaries
3. Utilize market segmentation to gain insights into who is and is not using the Library

Based upon a definition provided by [www.bizplan.com](http://www.bizplan.com), market segmentation is
Market segmentation helps organizations find new customers, gain insights, improve service delivery and become customer-centric. The Tapestry market segmentation system was used in this study. Tapestry classifies each U.S. neighborhood into one of 65 segments. Any particular location such as Douglas County will have some subset of those 65 segments. Tapestry synthesizes a range of demographic data, socio-economic data, housing characteristics data and consumer preference data.

This study analyzes Library use and market segmentation patterns at two levels: Douglas County as a whole and each Library location’s service area.

Findings and recommendations are presented in two parts: General Findings and Implications for Library Services.

**General Findings**

1. **Complex range of segments.**

   There are 42 segments countywide. While this number is not significant in itself, the population distribution across segments indicates complexity. By complexity, we mean a high degree of differentiation across a range of demographic, social, housing, and consumer preference characteristics.

   There is no dominant segment; the largest segment by population has only 11 percent of the total population. The top eight segments account for just over half of the population (266,352 people) while the top 12 segments account for two-thirds of the population (336,671 people). On the other end of the scale, the bottom 18 segments account for 10 percent of the population or less than 0.6 percent of the population each.

   This means that the Library is addressing an extremely diverse range of people. However, this concept of diversity is not one of simplified ethnic or racial classifications. In fact, diversity in this definition is more broadly based and allows for greater distinctions and nuances in meeting people’s needs and concerns.

2. **Lifestages dominated by young families with kids.**

   Lifestages were analyzed. Lifestages describe the general phase of life through which segments pass. Lifestages represent an opportunity to understand the needs, interests and concerns of people, and help develop and target a relevant Library plan of service for each lifestage.

   Five lifestage groups were identified. The largest has 56 percent of the population (286,908 people) is characterized as families with (younger) kids, generally through middle school. Other lifestage groups include married couples with older kids (either in high school, college or with families of their own) at 18 percent of the population, seniors at 12 percent, 20’s/single/ couples at 11 percent, and singles/couple professionals (no kids) at three percent.

   A Library plan of service should be developed to support the needs, interests and concerns of families with kids and married couples with older kids. Together these two lifestage groups comprise nearly three-quarters of the population. The Library should also consider, as part of its planning effort, developing strategic relationships with organizations that serve the needs of people in these two groups.

3. **Focus development potential by lifestage.**

   Development potential is an indicator that represents the opportunity to add new patrons by segment. Development potential is a ratio that measures the population of each segment in relation to the number of people who are not yet patrons. The countywide average development potential is 10.2.

   The top 10 segments, organized by lifestage include:
• Families with kids: Rustbelt Traditions (51.1), Boomburbs (42.5), Milk and Cookies (27.8), and Up and Coming Families (22.3)
• Married couples with older kids: Suburban Splendor (29.2), Cozy and Comfortable (19.8), and Sophisticated Squires (15.9)
• Seniors: Prosperous Empty Nesters (19.6) and Rustbelt Retirees (14.4)
• 20's/singles/couples: Young and Restless (22.2)
• Together, these ten segments represent approximately 135,000 people who are not yet patrons. Targeting development of these segments can be undertaken at the service area level.

4. Focus on specialty segments: low and low-middle income segments and immigrant segments.

The Library may consider specialized or targeted services for two segment subsets: low income and immigrants. Resources targeted for these segments can include developing an appropriate plan of service and strategically planning relationships with other organizations that touch them.

There are three low income segments that comprise 20,387 people or 4.0 percent of the population; and six low-middle income segments that comprise 18,272 people or 3.6 percent of the population. The low income segments include City Commons, Modest Income Homes and Social Security Set. The low-middle income segments include City Dimensions, College Towns, Home Town, Inner City Tenants, Simple Living and Southwestern Families.

There are four segments that have a higher than normal presence of immigrants, comprising 26,837 people or about five percent of the population. Three of these four segments are also low-middle income: City Dimensions, Industrious Urban Fringe, Inner City Tenants and Southwestern Families.

5. Applying other data

Other data can be added to project database including information on voting patterns, school performance, youth risk factors, crime rates, teen birth rates, and occupations and business tax revenues, among others.

Implications for Library Services

The following are suggestions for relating Library services to segments.

1. Service implications for education and families > Library offerings to these segments may include support for school related activities (e.g., school readiness, literacy support and homework support), bibliographic instruction; family-related cultural and civic activities; seasonal programs; children’s computer learning and Internet skills and resources; and college preparation and college entrance information. These services should be considered with respect to operating hours to accommodate working parents with limited time and availability (evening and weekend use), and kids who need somewhere to go after school. Similarly, children’s services should be considered in a manner that involves caretakers as active participants in the learning process. As juvenile’s age and attend middle and high school they will need to perform research and obtain homework support for increasingly complex projects. For parents of modest educational attainment, the Library can help to lift horizons for kids, especially with regard to college preparation and career visions. The Library can also help kids by helping parents support higher educational attainment goals for their kids.

2. Service implications for career development, investing and financial planning > The Library can provide ongoing support to assist many households with investment education, to inform consumer expenditures and to support career development including entrepreneurs and self-employment. With respect to career development, the Library can provide information about the evolving job market, continuing education options, entrepreneurship, and business data and research services. This may include partnering with public agencies (e.g., economic development, redevelopment, Small Business Administration, Small Business Development Centers, and others) and nonprofit organizations (e.g., chamber of commerce, service organizations). With respect to investments and financial planning, the Library can provide information for basics of investment in the equity and bond markets, real estate, as well as insurance and retirement planning and tools for
managing annual household budgets. With respect to consumer expenditures, the Library can provide information that supports durable goods expenditures especially related to home improvement projects and children’s products and services.

3. **Service implications for lifestyles** > These interests can be supported by the Library across a range of possible resources and programs addressing such topics as:

   - Home improvement and gardening, especially do it yourself projects
   - Outdoor recreational activities such as hunting, fishing, target shooting, boating, swimming, and traditional sports (baseball, football, basketball, soccer)
   - Indoor entertainment and recreational activities such as movies, playing cards, playing games such as backgammon and video games
   - Health and exercise including at home

4. **Service implications for immigration and Americanization** > The Library can welcome people in these segments to the community and support their integration into American life through a range of possible resources and programs addressing such topics as:

   - English and information literacy
   - The value of lifelong learning and continuing education
   - The importance of an informed citizenry
   - Participation in civic, cultural, recreational and community events

5. **Service implications for digital literacy and digital access** > Based upon the segment analysis, there are two separate needs: 1) digital literacy and 2) digital access. Digital literacy are computer and Internet use skills and knowledge, such as the ability to use various software applications and the Internet. Furthermore, we believe that they will be particularly receptive to using software and Internet resources that address children’s education, lifelong learning, individual fulfillment, career development, financial planning, shopping, and civic participation. Digital access is the availability of computers with Internet access. We suspect that many people have digital literacy skills but don’t own their own computers or have Internet access from home.

6. **Service implications: retired and near retirement** > Library offerings may include resources for enrichment, entertainment, recreation, cultural and community activities, and lifelong learning. A key will be for the Library to assist these people use their time productively and wisely. People will likely desire information and access related to civic activities, health care, local travel, home improvement and gardening, and developing computer and internet skills. In addition, Library activities that facilitate interactions with family (such as through reading together, shared computer activities, and cross-generational programs) will add enrichment. Furthermore, programs and services that address the needs of people living alone will become increasingly important.
Facilities Master Plan

A Facilities Master Plan, prepared for OPL in September 2010 by Himmel and Wilson and bcdm, integrated the following activities:

- update to the City of Omaha’s 1997 analysis of Library space per capita using range of .75 to 1 SF/capita, projected through 2030
- analysis of branch locations relative to population growth and distribution, drive time and usage
- facility assessments (architecture, building systems, hardscape and landscape, space utilization, and opportunities and constraints)

Facilities Master Plan’s summary of major findings:

- current, serious deficit in Library space per capita; projected growth and population distribution will compound this issue and require new facilities
- where overall quality and conditions of facilities are good, challenges in adaptive use and technology integration exist in older facilities and those with few opportunities for expansion
- disparity in use relative to population distribution across branches

The strategic planning process corroborated the findings, and identified other opportunities for facilities to physically reflect OPL’s brand, provide enhanced patron experiences, and facilitate more efficient workflows and patron convenience. All recommendations from the Facilities Master Plan, as well as supplemental projects that will support branding of the facilities, are summarized below.

OPL Capital Improvements

<table>
<thead>
<tr>
<th>Project</th>
<th>Size (SF)</th>
<th>Notes</th>
<th>New</th>
<th>Renovate</th>
<th>Relocate</th>
<th>Brand</th>
<th>Improve Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crossroads Mall</td>
<td>45k</td>
<td>Anchor in Development</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Downtown</td>
<td>100k</td>
<td>Signature Library; Replace W. Dale Clark</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Willa Cather</td>
<td>20k</td>
<td>Adaptive Reuse: Service Core</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>North Omaha</td>
<td>5k</td>
<td>Express Library concept; technology rich</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elkhorn</td>
<td>25k</td>
<td>Replace existing; potential relocation</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southwest (1)</td>
<td>25k</td>
<td>Address Population Growth (Vicinity: 186th and Dodge)</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southwest (2)</td>
<td>25k</td>
<td>Address Population Growth (Vicinity: 180th and Q)</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northwest</td>
<td>25k</td>
<td>Address Population Growth (Vicinity: TBD)</td>
<td>✓</td>
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<tr>
<td>Sorensen</td>
<td>1.5k</td>
<td>Expansion for Meeting Room</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>South</td>
<td>2.5k</td>
<td>Expansion for Children’s Room</td>
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<td></td>
<td>✓</td>
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<td></td>
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<tr>
<td>Millard</td>
<td>0</td>
<td>Enclose Teen Room; Revise public space utilization</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saddlebrook</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abrahams</td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Washington</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benson</td>
<td>0</td>
<td>Enclose Teen Room; Media Center</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>0</td>
<td>Adaptive Reuse of Swanson Branch</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Friends / Service</td>
<td>0</td>
<td>Adaptive Reuse of Willa Cather</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Core</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>RFID / AMH</td>
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<td>RFID and Automated Materials</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Model Building</td>
<td>0</td>
<td>Scalable model program for space allocation, utilization, and relationships</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OPL Branded Signage</td>
<td>0</td>
<td>Consistent wayfinding design, to include exterior and interior spaces, and address supplemental signage</td>
<td>✓</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Strategic Service Model

A service model represents how a Library is organized to deliver services. The public library’s conventional business and operational models are primarily founded in responsiveness to service needs within their communities. Libraries develop services, programs and collections based upon understanding these needs, some of which are ever present such as early childhood development, nurturing the love of reading, and life literacies. Other needs emerge due to societal change and technological innovations like mobile devices, eBooks and eReaders.

The rapidly increasing pace of change in our culture creates challenges when an organization is always in a responsive mode. OPL is evolving a new service model that is forward thinking and anticipatory, with a compelling future-focused perspective that will achieve and evolve OPL’s core strategies.

**Strategic Services Model Diagram**

The model is composed of four elements:

- Strategy
- Relationships
- Service Core
- Service Delivery

The model is not an organizational chart and does not represent specific people but rather functions within OPL. People and communities served are at the top of the diagram, with the functional activities of OPL as foundation. This arrangement serves as a clear message that patrons and communities are OPL’s primary reason for being.

The diagram places strategy in the driver’s seat, from which relationships are determined and nurtured. These relationships with patrons, strategic alliances, communities, and the media, are the connections and feedback loops that will determine the services provided.

The individual service core components are not represented in, but represent the system’s operations that are indispensible to service delivery:

- Patron Services
- Technology Services
- Circulation Services
- Facilities Management
- Integrated Library System
- Library Services
- Technical Services
- Staff Development
- Content Development
- Business Management

Service delivery occurs at the Central Library, neighborhood branches, the virtual branch and throughout the communities served. Service delivery is the culmination of functional activities, and represents actual interactions with patrons.

Each strategic service model component is explained in further detail.
The new OPL model is built upon the strategy element being the constant driver for the organization. The strategic role is embedded in the organization’s executive level and consists of four components:

- Business intelligence
- Technology foresight
- Contextual awareness
- Strategic financing

Each activity is methodical. Relevant analysis must be disseminated to those within the organization who need the information to best fulfill their roles and responsibilities in delivering the core strategies. These activities require constant attention, continuous improvement in methodologies, and adaptability to emergent trends.

This strategic plan does not signify an end to a planning process, but the beginning of a new organizational mindset and way of being. Rather than periodically developing a new strategic plan, staff will constantly ask themselves if their work helps to achieve the strategy. OPL as an organization will continually ask if it’s following the right track, or do whether the strategy needs to be adapted to new contexts and issues.

The broader activity of continually evolving and aligning strategy depends upon the tight integration of the four strategy components.

Public libraries are a business. They do not generate a profit, but reinvest any gains from efficient and effective operations to create greater impact.

In the private sector, business intelligence is the analysis of operational data representing historical and current performance (outcome relevant to inputs) and can serve to predict future performance in different outcome or input scenarios. Business intelligence often goes beyond internal operational data and analysis and incorporates competitive intelligence (product, service, customer, market and competitors) to create an even deeper understanding of organizational performance within a larger context. This type of analytics is essential to aligning decisions and resource allocations to business strategy.

OPL needs to integrate the use of business intelligence. Innovations in analytics from conventional data gathering and scrutiny of Library usage are necessary to achieve this. OPL must ask different questions of the data and measure impacts in addition to counting service statistics.

Another area where OPL can integrate business practices is formalizing and integrating risk assessment methodology to include criteria for decision-making into its practices. This currently happens, but at multiple levels and with individualized criteria, risk thresholds, and perceptions of risk. Not every action requires risk assessment, and creating a culture of risk recognition can also create freedom and empowerment at all staff levels to support excellent patron services.

Technology is one of the most ubiquitous and rapidly changing factors in operations and service delivery in every sector (public, private and non-profit), and library services are significantly dependent upon technology for service delivery. Technology is critical to operations, as well as services in that patron access to computing and the Internet is a key reason why many rely upon the Library. Continual attention to technology trends and long-term technology forecasts will help OPL to avoid being surprised by new technologies and better able to strategize future services.

Foresight and understanding of the industry will inform technology procurement and deployment decisions. OPL will be able to make fully-informed decisions about adoption and obsolescence of technologies, and accurately budget for and strategically finance implementation and use.

Developing contextual awareness within a local, regional, national and international context will provide OPL with the means to create scenarios and anticipate emerging trends and issues that could impact Omaha.

Contextual awareness, or knowledge of history, news, current and emerging issues, and future predictions, should be coordinated across the organization, as it will inform content development, new services, programs and technologies, and service delivery. Nexus and Long Reach strategies depend highly upon a deep understanding of market segmentation, community issues and opportunities, and local to global trends and forecasts that will immediately or eventually influence Omaha.
In delivering Library services, contextual awareness might also be implemented in direct response programs and services oriented toward emerging events local to global.

OPL could mobilize efforts to inform and educate its communities and facilitate dialogue in areas of interest and concern—thereby creating the global awareness that community leaders believe is necessary for Omaha to continue to thrive.

Public agencies conventionally create future budgets based upon existing expenditures with anticipated cost increases, plus funding necessary to initiate new services or address known facility issues or plans. OPL’s revenue streams include:

- City of Omaha general fund
- Douglas County Library supplement
- Keno/Lottery reserve and proceeds
- Library fines and fees
- State of Nebraska
- U.S. federal funds
- OPL Foundation
- Friends of the OPL
- Grants and other income
- City Capital Improvement funding

Through integration of a strategic finance perspective, will be better able to develop longer-term tactics in both operational and capital budgeting, and financing of core strategies, services and special initiatives.

OPL needs to develop viable revenue sources for both expected and enhanced service levels. OPL must work with the City to identify expectations for community Library services and fund them accordingly. Over time, budget allocations were altered by the need for reductions and never reinstated, inadvertently creating new benchmarks. General fund revenues need to reflect expectations for Library services in Omaha. Ideally, general fund revenues might be converted to designated funding streams not jeopardized by general fund balancing efforts.

Realigning general fund revenues will also position the OPL Foundation to provide donors with individualized opportunities to fund enhanced services or create new opportunities for OPL to serve its patrons and communities.

Omaha has experienced wonderful successes in using public-private partnerships to develop legacy capital projects as infrastructure in the city. Arts and cultural, sports, and other venues developed in this way contribute greatly to the urban fabric, citizen’s experiences and Omaha’s economic growth development. This model could be explored as a means to more quickly complete a comprehensive capital improvement program, providing equitable and accessible Library facilities and services throughout the service area.
Strategy sets the stage and identifies the relationships OPL engages in to include patrons, communities, strategic alliances and partners. The difference between the terms strategic alliances and partners should be recognized. Currently, any organization or individual that OPL collaborates with in service delivery, sponsorship opportunities, or grant sources is referred to as a partner. Because these partnerships are mostly held at the branch level, there is a lack of organizational understanding of partners. In moving forward, OPL will differentiate between strategic alliances and partners. For OPL's purposes strategic alliances are defined as strong collaborations, over a long period of time, that intend to accomplish something that benefits both parties in achieving their purpose and goals. Partners are defined as entities that engage in singular or limited-extent collaborations, to include sponsorship for a specific activity or delivery/collaboration in a single program, event, etc.

OPL's marketing staff will lead the Patron and Communities relationship element, an expansion of the current realm of their influence and support activities. Marketing staff currently manages media contacts and public relations (PR), as well as brand guidelines and discipline, including development of toolkits and templates, and staff training.

Currently, patron relationships are largely transactional, and there are no standardized organizational processes to engage patrons and develop brand relationships. A centralized campaign, developed with and implemented by patron services staff, could be created for retention of existing patrons.

The new service model element creates opportunities for targeted marketing and messaging, and patron feedback on services, experiences and content. This strategy will eventually strengthen patron identification with OPL more strongly than a neighborhood branch, and the unified advocacy messaging will heighten the value perception of the Library in and across communities.

Leadership goals for this element include a centralized channel for communications, and a continuous feedback loop to improve services and discover emerging needs. By strengthening relationships with the local and even national media, OPL can and should become a trusted source for Library content, and be able to provide a unique perspective on things that affect the community, and identify how the Library can help.

What is currently the Community Services department at OPL will evolve to lead the Strategic Alliances and Partners (SA) element of the service model. The Nexus core strategy requires the shift from individual relationships to organizational relationships, and a focused effort on nurturing, managing and liaising. Procurement and implementation of a tool to capture the interactions, goals, collaborative initiatives and agreed upon performance measurements is critical. Larger than a contact database, this software application must provide features that provide OPL access to current and historical relationship content, as well as provides the ability to develop and track new relationships that OPL is pursuing.

This element will work closely with Library leadership in identifying potential strategic alliances using criteria including alignment in purpose, culture and strategic goals, as well as complementary rather than duplicate strengths.

Strategic alliances include the Library advocacy groups, OPL Friends and Foundation. This element and the Executive Director will cultivate relationships and develop a unified messaging. Additionally, SA must work with staff to develop relationship management competencies and expectations/accountability for working with alliances and partners.

Aspects of the business intelligence developed for OPL’s strategy and operations will be valuable to strategic alliances. OPL could share with its strategic alliances applicable content from its business intelligence and contextual awareness activities in the strategy element. Sharing the intelligence developed through research is yet another way to strategically support alliances and community assets, reducing the need for these organizations to conduct the research themselves and allowing them to focus their effort directly on the issues.

Leadership goals for this element include a centralized contact for and management of strategic and partner relationships, a unified representation of OPL in the Omaha megacommunity, and leadership for staff in doing the work of the Nexus and Long Reach strategies in collaboration with others.
Service is a contact with a patron, whether in person or virtually, and is facilitated by staff, technology or self-service/use.

The expertise provided by the Library, whether directly through staff interaction or indirectly in Library-developed and distributed guides, tutorials, etc., is likely the most prominent aspect of what defines public libraries and why they are so highly valued by their traditional patrons. OCLC’s Perceptions of Libraries 2010 Context and Community report states “Americans see and appreciate the value of librarians” and “75% believe that the library brand is books.” The definition of collections is being expanded by OPL to the larger scope of content.

Conventionally, libraries source collections and make them available to their patrons. But OPL actually produces content including lib guides and reader’s advisory, and will continue to create specific content for patrons as well as co-create content with strategic alliances and partners. When OPL is recognized and valued as an original, and trusted, content provider – its brand will move beyond books.

Experiences are any interaction with the Library—physical or virtual, individual to interactive. Experiences are very often multidimensional, comprised of content (collections and resources) and expertise (help from staff).

The business world recognizes the value of designing and branding an experience in addition to a product or service, and our society and culture has been trending toward valuing experiences over commodities. Every interaction a patron has with OPL’s brand is an experience, which creates affinities to place and perceived value for the Library. Ray Oldenburg created the Third Place concept (a desired place to be beyond home and work); his work illustrates how libraries are or can be essentially great, good places. Embedded in both core strategies is OPL’s goal of becoming a beloved Third Place in its communities.

The strategic service model reflects how OPL is organized to deliver services. Although strategy and relationships set the context for service, OPL relies upon the elements at the service core of the organization to develop and deliver them directly and indirectly to patrons and communities.

**Services Core Diagram**
Patron services refers to the transactions between OPL and its patrons, whether with staff or online, and are differentiated from Library services and programs. The functions and activities include:

- Materials checkout and return
- Patron account management
- Holds / Requests
- Interlibrary Loan

As the primary point of contact for the activities above, Library aides and clerks are responsible for significant interaction with patrons. They will benefit greatly from the development and compliance with OPL service philosophies and core competencies, and OPL will achieve consistency in patron experiences throughout the system. Leadership goals in this area include compliance with and accountability to established processes and procedures, and strong initial training with continuing education.

Because these staff members have regular face time with patrons, they are positioned to support the Nexus and Long Reach strategies by:

- seeking interests and sharing information about relevant upcoming programs throughout the system
- distributing relevant content (i.e., readers’ advisories, and new material updates and promotional items)
- support Patrons and Communities element in retaining existing patrons by conducting outreach or working proactively to avoid card expirations
- sending staff into communities and to events to issue new cards and create new patrons on the spot
- being a channel for ongoing feedback on patron satisfaction that informs the Patron and Community Relationships element
- enhancing patron engagement by building upon professional, friendly relationships with frequent use patrons (a note or phone call when someone is missed in the Library, or to celebrate an event or express sympathy for a family)

All value-added services will need to be facilitated by sophisticated deployment of ILS features and collaborative efforts with ILS, Circulation Services and Library Services elements of the Service Core. Imagine that when a card is swiped, the staff screen will show the transaction information from the ILS and a second patron-facing screen will scroll personalized information on recommended programs and content based on the patron’s self-developed account profile.

Leadership goals in this area include the development or adoption of service philosophies that create consistency in patron experiences across the system, and accountability of staff to expectations and performance measurement in service delivery. Rotating staff to locations throughout the system may help to create organizational identification and minimize branch-specific nuances. Additionally, the development of a formalized issue escalation team, could decrease the amount of training for staff in special-circumstance situations and provide consistency in implementation of policies and procedures.

Library Services will evolve from current programming for age-delineated audiences (youth and adults), to serving the spectrum of need, lifestage, lifestyle and interests with programs and expertise supported by content. This centralized element will direct and coordinate service delivery throughout the OPL system:

- Reference and research assistance
- Programming
- Readers’ advisory
- Outreach services

Currently, no centralized guidance occurs for the development and delivery of individual programs. Decisions are made locally and some programs are often delivered only at the branch where they originate. Expectations or guidelines for reference, research assistance and readers’ advisory activities do not currently exist system-wide. Leadership goals in this area include the development of service philosophies that will create consistency in patron experiences across the system and accountability of staff to expectations and performance measurement in service delivery.
OPL can achieve core strategies by creating a hybrid collaborative services and programming model (centralized to localized). Library Services will develop processes and procedures to leverage resource investments in programming and services currently happening at each branch.

For programming, the model will include developing products that can be distributed rather than engaging effort for one-time activities. Most programs will be evaluated for their ability to be delivered to more than one age-delineated audience and at multiple branches on multiple dates. One-time programs will be the minority approved for development, and used to support the Nexus and Long Reach strategies in narrow, niche circumstances.

Consider the efficiencies of the new model. Incremental additional efforts (time and resources) can move a program from a one-time activity to one that serves all 12 locations across five different age groups (youth, tweens, teens, adults and seniors). One program could be leveraged to 60 programs and even more if offered on more than one date.

The service model will include the concept of continually feeding outcomes of individual reference and research transactions into knowledge bases or guides, which then become accessible to patrons individually or with help from staff. An organizational identification of the need for content, and collaborative approach to its development, could create more autonomous and online content access, as well as free staff to focus on more challenging reference and research needs.

Technology services addresses the following Library needs:

- Liaison to City of Omaha’s IT support system, DOT.COMM, for outsourced services (infrastructure, security, etc.)
- OPL specific infrastructure, etc. not addressed by DOT.COMM
- Patron technology support
- Staff technology support
- Website content

A key element of the strategic service model, Technology Foresight, will likely rely on many of the staff in this element, to provide the strategic perspective and insight into current and emerging technology trends.

Leadership goals include evolving the website into a virtual branch with much more synergy with the physical branches. How the website and its content are designed and managed may change and should involve patron services and marketing staff to create seamless services as much as possible across the physical and virtual realms.

Collection Development at OPL is currently led and performed at the administrative level, with specific staff associated with selection of materials and resources according to intended audience (adult, youth) as well as formats (print, media, eBooks).

The implementation of Collection HQ, a tool that develops intelligence for collection development, maintenance and merchandising, promises to be of great value in the Long Reach core strategy as well as in strategic support of the Nexus core strategy.

Because core strategies require understanding and addressing niche interests and needs at each branch, collaboration with staff at the branches will need to become much more interactive than the current centralized model. Because OPL, either alone or with strategic alliances, will generate even more original material while implementing the core strategies the concept of ‘Content Development’ rather than collection development should be considered and ideally adopted. Newly created content might range from niche interest resources to academic research conducted on the megacommunity approach in Omaha.

Leadership goals for this area include the development of a hybrid collaborative (centralized to localized) content development model, with an annual process that integrates analytics from Collection HQ and market segmentation, and aligns to the needs established and prioritized in the core strategies.

Funds spent on content should also be reviewed and adjusted to reflect both priorities in the core strategies as well as historical and projected demand by patrons. Currently there are slight discrepancies between funding for specific
collections and their use by patrons that should be evaluated; prioritization from core strategies will likely change future allocations.

Integrated Library System (ILS) includes the management and administration of the library system technology, and is currently leading the deployment of a new system from Innovative Interfaces. ILS is integral to the Patron Services, Circulation Services, Technical Services and Content Development elements.

Leadership goals for ILS include more sophisticated mining of the ILS data and usage statistics to develop better business intelligence and use of ILS features or add-ons to enhance patron services and experiences.

Technical Services performs acquisition, cataloging and any required processing of selected materials before they become available to patrons and staff, and is a highly process-oriented element of the Service Core. Implementation of the new ILS will likely be the primary reason for any change in current processes.

However, staff can assist in identifying how cataloging data can facilitate better business intelligence and should be included in conversations about the ILS implementation. Stronger collaborations and input on ILS functionality might result in cataloging processes/content that facilitate implementation of core strategies and enhance patron services, and improve the development of business intelligence.

Leadership goals for this element include collaboration with Content Development, ILS and Circulation Services, as well as becoming technical advisors to other service elements to optimize use of Library systems, and enhance service delivery and organizational performance.

Circulation Services currently manages materials handling and distribution functions vital to the operation of the Library. These include check-in and shelving of returned and new materials, and transport of materials throughout the system. This is a highly process oriented element, with established and well documented procedures. Any significant change as to how this element functions will likely come from any adoption of new technologies (namely RFID and automated sorting).

Although the staff who provide patrons services are organizationally included in Circulation Services, the strategic service model differentiates between the two functions (patron services and circulation services).

Leadership goals include tight integration and collaboration with Content Development, ILS and Technical Services elements, and a focus on conformance to established procedures system-wide.

Staff Development encompasses orientation and training of new staff, continuing education for existing staff, and managing volunteerism at OPL. This element will be crucial in readying OPL to implement its core strategies and will lead the development of and training in core and special competencies, as well as professional development for leadership (delivered by the Library or through other sources). Current resource allocations for staff development will likely not address the need for significant staff time and effort in education and training. The magnitude of investment will need to be identified and resources allocated and prioritized accordingly.

OPL’s new staff-orientation process will need to integrate core competencies and, if possible, should be centrally administered for all positions. To ensure consistency, OPL should consider centralized interviewing, selection and orientation for all staff, or develop a robust process for these activities and train branch leadership in its application. If the latter is used, performance measurement and accountability to standards must be embedded in the process to support organizational and not branch specific implementation.

Revising position descriptions, where possible, to reflect the competency expectations within different classifications will better position OPL to hire the best staff. For example, identifying customer service experience (public, retail, etc.) as preferred criteria for consideration in non- or paraprofessional patron service classifications might assist OPL in qualifying the best candidates. Customer service experience may even be preferred in professional classifications as well.
Professional development or continuing education plans should exist for all paraprofessional and professional staff, and ideally identify and build upon the individual's unique expertise and special interests. Putting people in a position to play to their strengths is the best method for creating a high performing organization. Use of Gallup Strengthsfinder 2.0 as part of the orientation and development processes is recommended as a powerful way to achieve staff development and retention.

Staff development in the future must also address those outside the library profession but critical to the organization. Individuals who may not be library professionals need opportunities for continuing education, development and advancement.

Leadership goals for Staff Development include an OPL-centric hiring and orientation process, comprehensive staff development plan and process, tight integration of staff development with Business Management and the performance appraisal process, and efficient delivery of continuing education aligned to priorities developed for the core strategies.

Facilities management includes the liaison function with the City of Omaha’s Building Services to address maintenance, repair and replacement at OPL facilities, as well as collaboration with the City’s Planning and Public Works departments and design teams to provide initial program requirements and feedback in the design and construction of renovations and new facilities.

A critical initiative for this element in the service core will be to develop and implement a long term Capital Improvement Program for OPL. The Facilities Master Plan developed in 2010 provides findings and recommendations including:

• renovation, expansion and potential relocation of some facilities to address population growth, building and systems issues, and integration of new technologies and workflow improvements
• new facilities to address the projected growth and development in Omaha to the west, northwest and southwest
• potential adaptive reuse of facilities to address administrative and system-wide operational functions, relocating them to less expensive and more geographically centralized real estate

With a strategic plan in hand, OPL now has a framework for prioritization of these projects. Nexus and Long Reach core strategy research and implementation will reveal where capital investments need to be made. However, emerging opportunities will always play a role as to when a project may become active. The Crossroads Mall development is a prime example. Where it may not be the highest priority to support core strategies, when advantageous real estate and funding opportunities appear OPL should act on them.

Business management includes the business operations and administrative office management functions at OPL. These are budgeting, fiscal, reporting, support for the Board of Trustees, and liaison to the City of Omaha’s HR Department including managing the performance appraisals process at OPL. Library reporting requirements—local, state or national, are accomplished in this group. Currently, grant applications are centrally tracked through this element due to the funding aspect.

Like the Circulation and Technical Services elements, this element is very process-oriented and represents one of the ‘bright spots’ of process design and facilitation already present within OPL. Ideally, use of technology will reduce paperwork, and processes will be streamlined to the essence of what needs to be accomplished. Easing the compliance burdens on all staff, where possible, would be much appreciated and generate additional capacity in the system to achieve the core strategies.

Leadership goals for this element include continued process improvements to facilitate interactions and responsibilities of staff throughout the organization, and the sharing of process design and development experiences.
Organizational Innovation

The new strategic direction represents a significant shift from existing conditions and promises to be transformational for Omaha and OPL. A new purpose and vision are emerging, and OPL is reinventing and innovating itself toward success.

As a foundation to the new purpose and vision, OPL is undertaking an inclusive staff process to craft guiding principles. These beliefs, promises and expectations will be communicated to staff, patrons, strategic alliances, partners and communities served through:

- core values
- service philosophies
- core competencies

Throughout the strategic planning process, all staff participated in the development of a series of core value concepts, which were finalized and presented at the April 2011 Staff Development Day. These core values set the stage for how OPL will proceed in articulating its new purpose and vision, service philosophies, and core competencies.

**OPL Core Values**

Core values are beliefs embraced by each individual staff member and essentially their reason for being a part of OPL. They are timeless and intended to be not only relevant but also deeply held one hundred years from now.
OPL Core Values

Service Excellence
We provide positive and welcoming experiences to everyone online and in person.

Integrity
We are a trusted resource for our communities. We take pride in our commitment to honesty and transparency.

Innovation
We continually seek new and better ways to serve our communities. We anticipate change and respond quickly.

Community Engagement
We are an integral part of the communities we serve. We seek and nurture relationships with other organizations to develop partnerships that move Omaha forward.

Equal and Inclusive Access
We are free and open to all. We provide programs, services and resources that represent diverse viewpoints and ensure equitable access to everyone.

Staff Talent
We recognize our staff as our greatest resource. We are passionate about our work, we have fun and we work together as a team. We trust each other and respect diverse ideas.

Service Philosophies

Service philosophies guide staff in interactions with patrons. These are essentially the commitments made to patrons and fellow staff members for expectations in how OPL employees provide services. They reflect the values and priorities of the organization and, in OPL’s case, put the patron first.

Service excellence and organizational performance are founded in system-wide standards (expectations) for functional activities. Consistency in service delivery is critical to patron perception of the value of OPL, as different experiences on different days and at different branches result in patron confusion, dissatisfaction and even conflict with staff. Patron and staff experiences can be much more enjoyable when system standards and expectations exist and everyone is playing by the same rules. Accountability is much simpler to achieve when expectations are clear, and not dependent upon how things are done at one branch versus another.

As an element of its organizational advancement, OPL will develop service philosophies that will guide interactions with patrons. Ideally these philosophies will be simply articulated and published to staff in a ready reference format.

Core Competencies

In the same way service philosophies achieve consistency and accountability to expectations, the identification of and training in core competencies ensures that patrons will always receive a certain level of service, expertise and assistance independent of the individual staff member that is helping them. Therefore, basic levels of competency for all staff in the areas of technology comprehension, application of Library policies and procedures, and use of Library systems, guarantees that most patrons can be helped at first encounter rather than being referred to others.

Beyond service-oriented competencies, OPL intends to develop basic organizational competencies that will empower staff at every level to evaluate situations and make the best decisions without always having to consult a supervisor. Communication, situational awareness, organizational understanding and conflict resolution are all competencies that will serve both staff and the patrons they serve, resulting in a better patron experience.

As one of the first organizational initiatives in implementing the core strategies, OPL will develop both core (all staff) and special (some, but not all staff) competencies to further improve both service and organizational performance.
Organizational Advancement

The new strategic direction represents a significant change from existing conditions, both in the Library and in the communities served. For OPL, this provides an opportunity to transform the organization and redefine what the Library is and does in Omaha. This transformation must be intentionally designed and implemented. It is essential that the organization is ready to deliver the strategic plan and successfully execute the Nexus and Long Reach core strategies.

The following OPL initiatives are in prioritized order, using these criteria:

- organizational readiness
- patron focus
- mission critical intensity
- magnitude and longevity of effort

Initiatives Ascending Stair Diagram

Staff development and building organizational capacity must be addressed first in order to implement the new strategic services model in support of the core strategies and their goals and objectives.

2011 – 2012 OPL Initiatives

1) Create and begin implementing a master staff development and utilization plan
   a) Create organizational core competencies and a staff development plan
      i) Review and expand upon core competencies identified in strategic planning process:
         (1) patron service
         (2) public access and staff-specific technology knowledge and expertise including emerging technologies and transliteracy
         (3) organizational awareness and community understanding
         (4) effective communication and time management skills
         (5) Library advocacy and OPL marketing
         (6) personal responsibility and accountability, in both individual and collaborative/team efforts
         (7) professionalism, tolerance, adaptability, initiative
(8) intellectual curiosity, situational awareness, creativity
(9) critical analysis, problem solving skills, pattern recognition
(10) staff alignment to and adoption of the Strategic Plan

ii) Review IMLS’ 21st Century Skills document\textsuperscript{12} and the P21 (www.p21.org) project to identify other competencies that should be included

iii) Review Competency Index for the Library Field\textsuperscript{13} and all source documents referenced within for more information on competencies developed by and for library peers

b) Create Special Competencies (some, but not all staff) and a staff development plan
i) Develop process/project design and facilitation competencies at OPL
   (1) Identify staff with process and project management proficiencies, and create a train the trainer program to enable trained staff to develop the competencies in others, or recruit / insource people with these proficiencies
   (2) Create guidelines for OPL standard operational practices for designing and implementing processes and projects
   (3) Create guidelines and methodologies for performance measurement
      (a) use both quantitative statistics and qualitative impacts
      (b) consider triple bottom line accounting
   (4) Identify training and learning resources for process design, facilitation and project planning and management
      ii) organizational and community analytics
   iii) interpretation of demographic, market segmentation and organizational analytics to develop robust strategies for
      (1) developing new or improved services, programs and expertise for patrons
      (2) retaining patrons and growing market share
      iv) utilization of GIS tools
   v) development of collaborative funding models and grant applications
   vi) Identify sources for education, training and professional development, and create learning plans for staff

c) Create an OPL Leadership development plan that addresses:
   i) Transforming OPL into a learning organization\textsuperscript{14}
   ii) OPL’s expectations for professional development activities
   iii) Leadership and management education and training
   iv) Individual’s areas of expertise and focus
   v) Performance measurements and accountability within performance reviews

2) Create organizational capacity by streamlining processes and activities
a) Develop a process to enable greater service within current budget and staffing, aligned to the strategic service model:
   i) evaluate and revise position descriptions to incorporate core competencies and determine alignment to new roles, functions and activities
   ii) consider different distributions of staff classifications to achieve both the Nexus and Long Reach goals
b) Identify high yield, priority investments that will enable OPL to achieve the Nexus and Long Reach goals and objectives. Consider:
i) RFID and automated sorting of materials to allow staff to focus more time on direct customer services (interactions and content development)

ii) Intranets to facilitate internal communication and knowledge management, and extranets (authenticated access to OPL maintained resources for strategic alliances and partners) to facilitate collaboration

3) Review and develop patron services within the strategic service model

a) Create service philosophies that describe the expectations for patron interaction especially for direct services but applicable to indirect services as well

i) standards and consistency in patron service and interaction
   (1) circulation
   (2) account management
   (3) reference and research assistance
   (4) public access technologies

ii) performance and accountability to OPL expectations

iii) quick reference format and language

b) Review OPL policies and procedures to:

i) ensure a patron-centric perspective – ‘patron first’

ii) design for best case scenarios, not anomalies

4) Develop the strategic elements of OPL

a) Strategy

i) Business Intelligence

   (1) Design a process for and identify staff (collaborative teams, rotating responsibilities) for ongoing analytics to incorporate the following:

   (a) Library usage statistics

   (b) operational statistics and performance measurement/productivity

      (i) return on investment analyses (e.g. cost of collections/content related to usage or cost and time to produce a program related to outcomes of the program)

      (ii) track performance and productivity, as well as patron satisfaction, in key patron service areas (materials handling, account issues resolution, etc.)

   (c) staff development and competencies

   (d) annual market segmentation data refresh

   (e) competitive analysis

ii) Technology Foresight

   (1) Design a process and identify staff for

      (a) continual research into technology trending and forecasting

      (b) analysis of technology impacts (service) and opportunities (operations)

iii) Contextual Awareness

   (1) Design a process and identify staff who will periodically research and publish global, national, regional and local snapshots and trending, with analysis of potential impacts to OPL and the community
iv) Strategic Financing
   (1) Recruit, internally develop or insource the strategic perspective and expertise in operational and private financing of Library services and initiatives

b) Strategic Planning
i) Design processes that embed strategic planning into the annual business cycle of OPL.
   (1) schedule standing, quarterly strategy sessions offsite
   (2) utilizing the four strategy components in 4.a. above, as well as involving other staff as appropriate, review organizational progress on strategic plan and critically question whether strategy should shift or change direction
   (3) communicate outcomes to staff

5) Develop the relationship elements of OPL
   a) Clarify the roles of each element and communicate them to all staff
      i) Patrons and Communities
         (1) responsible for media and public relations
            (a) engaged in patron relationships, other than account management, obtaining input, feedback and patron satisfaction ratings
         (2) leadership in marketing, communications and brand evangelism
         (3) develops toolkits and templates to optimize marketing and advertising by distributing to neighborhood branches and other elements of the OPL
      ii) Strategic Alliances and Partners
         (1) responsible for managing and documenting OPL liaison and designated neighborhood branch relationships
         (2) responsible for OPL organizational communication with strategic alliances, partners and community assets
         (3) leadership in developing protocols and facilitating communication
   b) Develop processes and procure resources as necessary to enable the work
      i) relationship management software
         (1) integrated with ILS if possible
         (2) project and process features that relationally represent organizations, contacts, collaborative efforts, intended impacts/outcomes and performance measurements and monitoring
      ii) brand discipline/management tools

6) Review and align the Facilities Master Plan to the Nexus and Long Reach core strategies
   a) Create a Capital Improvement Program Plan to identify projects, scope, projected costs and impacts
   b) Collaborate with leadership in Nexus and Long Reach core strategies to develop criteria for prioritization
   c) Develop the physical representation of the OPL brand and the strategic service model in its facilities; intended for implementation at all OPL locations as opportunities arise (renovations, new facilities, maintenance, repair and replacement activities, etc.).
      i) research best practices in spatial configurations and service delivery for patron convenience and satisfaction in usage of libraries
ii) facilitate staff and patrons through a discovery process, intended to identify use patterns, preferred points and patterns of customer service, signage and configuration for specific spaces/uses like computers, teen zones, children's areas, quiet reading/study, etc.

iii) identify and implement any feasible changes to facilities to improve the patron experience

iv) create a scalable model building program the future which identifies the types of spaces, activities, functionality, spatial relationships, furniture, equipment, signage and wayfinding necessary to deliver the strategic service model.

7) Develop the Library Services element in the Service Core
   a) Develop a hybrid (centralized to localized) program development and delivery model
      i) develop a proposal process for individual development of programs, utilizing a checklist with criteria to establish alignment to OPL strategy, required resource allocation and potential return on investment; require 'program as product packaging' for system distribution where applicable
      ii) develop a program evaluation process to document program performance (operational and patron satisfaction) utilizing ILS if possible or online tools with relational database capability to develop analytics over time
   b) Focus on transforming the OPL website into a virtual branch
   c) Develop OPL standards (integrate into special core competencies) for delivery of Library services and disseminate/train staff in compliance
      i) reference and research assistance
      ii) reader's advisory
      iii) Interlibrary loan
   d) Develop a comprehensive outreach services program that incorporates strategic support of alliances and partners and manages the OPL presence beyond the Library
   e) Collaborate with Patron and Community Relationships to maintain brand discipline while streamlining and distributing marketing activities for services and programs
   f) Collaborate with Content Development, Tech Services, Circulation Services, Technology Services and ILS elements to identify process integration and improvements

8) Develop the Content Development element in the Service Core
   a) Develop a hybrid (centralized to localized) content development process, integrating analytics from Collection HQ and market segmentation information to facilitate greater collaboration in developing core and niche specific (market segment/neighborhood) collections/content
   b) Create an annual calendar of content development activities and schedule milestones to include, but not be limited to:
      i) acquisition of content for annually scheduled OPL programs and events, and in alignment with strategic alliance annual calendars (reading programs, school terms, holidays and celebrations, seasons, etc.)
      ii) lead and lag times for selection, acquisition, and technical services processing to shelf
   c) Develop a resource allocation model and plan to ensure that distribution of resources reflects OPL priorities in the Nexus and Long Reach strategy
   d) Collaborate with Tech Services, Circulation Services, Technology Services and ILS elements to identify process integration and improvements

9) Align the ILS element in the Service Core
   a) As OPL migrates to the new ILS, explore the potential for these patron and OPL specific usages:
i) patron outreach and communication (Patron Relationships and Circulation Services)
   (1) self-created patron profiles
      (a) preferences (email, text, phone, mail, etc.) and opt-ins for communication
      (b) interest areas
      (c) interest in volunteerism
      (d) interest in Nexus issues (connect to Nexus)
   (2) social network integration to Library experiences
   (3) feedback opportunities
   (4) card expiration noticing
   (5) program and event notifications

10) Review and refine the Business Management element’s organizational processes and structure.
   a) Clarify the roles and interrelationships and communicate them to all staff
   b) Create additional processes to streamline activities, information gathering and compliance with requirements
      i) budgeting and expense reconciliation
      ii) grant research and writing
      iii) staff management and performance assessments
   c) Develop measures of accountability and embed in staff management and performance assessments
Strategic Goals and Objectives

Goals and objectives support achievement of the strategic direction, but are often confusing (and confused) terms. In this plan, the goals are statements about the benefit and value to patrons, strategic alliances, partners and communities. Objectives describe how OPL will achieve the goal, articulated as specific processes, projects or activities. Performance measurements are integral to objectives, and identify specific targets for activities where possible. All objectives are represented in priority order in a timeframe contained in Section 6 of this document.

The Nexus strategy positions OPL as an integral element in facilitating community collaboration. The Nexus goal and objectives in the first year are process oriented, with timeframe and performance measurement criteria appropriate to the larger initiation of the Nexus concept, as opposed to the actual work that will be accomplished in collaboration with strategic alliances and partners.

The collaborative entities will develop shared performance measurements and community indicators. Creating specific performance measurements for the work done at this point is not feasible. OPL will need to integrate the Library’s performance measurement format and methodologies with their strategic alliances and partners.

The Nexus strategy is a completely new and extremely challenging direction. Being successful requires that OPL reinvent itself, create new competencies and proficiencies not as prevalent or necessary in traditional library service delivery, and assume a leadership and facilitator position in Omaha. This will require reallocation of funding and staff time.

Nexus will also, implicitly, create new patrons. In providing strategic support within the megacommunity approach, OPL will have direct access to each organization’s service population and a focused opportunity to capture their interest and amaze them with service. These larger groups already exist and will be introduced to the Library by a trusted source—the strategic alliance that is helping them better their lives. Less effort by OPL is required to reach these individuals and families and convert them to patrons.

For the Long Reach strategy, the initial goal and objectives are also primarily process-oriented, with quantitative measurements proposed as well as concepts of relating qualitative measurements to Nexus focus areas where applicable.

The concept of harnessing increasing capacity in OPL under existing circumstances is woven throughout the strategic plan for a reason. Using successful outcomes to make the case for additional resources is much more viable an approach than arguing a need and promising OPL can achieve success in addressing it. Until additional resources are procured, OPL will need to prioritize allocation of current funding, staff time and Library services. Increasing capacity requires thinking about how current resources are allocated and making decisions about which activities are most beneficial to achieving goals.

OPL can succeed in its core strategies, but only if it is willing to leave the comfort zone of creating a new patron one at a time. It must initially dedicate more resources to implementing the Nexus strategy.

The objectives for each goal on the following pages are organized within the strategic service model elements responsible for their leadership – and therefore are not organized in sequence. A chronological interrelationship (precedent and subsequent actions) is represented in the Timeframe in Section 6 of this document.
NEXUS Goal

Omaha will resolve underlying issues that jeopardize both quality of life and the city’s vitality with OPL as an essential catalyst, collaborator and connector utilizing a megacommunity approach.

2011-2012 NEXUS Objectives

A well-designed and facilitated process using the megacommunity approach and strategically supported by OPL will create more accessible shared resources and greater community impacts in the issue areas.

Nexus in Motion Diagram

Strategy

1) Working with strategic alliances, design a proposed process for the development and implementation of a megacommunity approach to resolving issues in Omaha.
   a) The proposed process (roadmap) will illustrate:
      i) starting point and intended result
      ii) groups involved
      iii) specific, interrelated activities
      iv) timeline
   b) A key aspect of the process will include the identification of a short-term pilot project with one or more strategic alliances that will inform the unique implementation of the megacommunity approach in Omaha.
      i) Specific and achievable goals, objectives and performance measurements for this pilot project will establish OPL’s credentials for collaborating with strategic alliances to make positive impacts in a focus area.
ii) OPL will identify the resources necessary to strategically support the pilot project and allocate staff, technology, or funding accordingly.

c) Resources

i) The Connected Community: Local Governments as Partners in Citizen Engagement and Community Building, Alliance for Innovation (included in Appendix, refer to Appendix Content)

ii) Building the Organizations That Build Communities Strengthening the Capacity of Faith- and Community-Based Development Organizations (included in Appendix, refer to Appendix Content; note that focus is on community development but many concepts are extremely relevant)

d) Timeline and performance measurements

i) proposed process designed and documented per duration in Timeframe

2) Develop or procure (with strategic alliances if possible) an analytics application that both sets an initial benchmark and supports ongoing measurement of progress in the focus areas. This application will be utilized in both the Nexus and Long Reach strategies.

a) Develop criteria for the application

i) should include the ability to map (geocode), integrate and visualize diverse data sets:
   (1) GIS functionality
   (2) U.S. Census and American Community Survey data
   (3) Market Segmentation (ESRI Tapestry Data)
   (4) Library usage statistical data integration
   (5) Community indicators data (poverty, educational success, health, etc.)

ii) criteria should also include the ability to create and analyze scenarios and database statistics to enable ongoing performance measurement

b) Procure and implement the application

c) Designate and train appropriate staff

d) Timeline and performance measurements

i) meets design and functional criteria as established by OPL and strategic alliances

ii) operational per duration in Timeframe

iii) staff fully trained per duration in Timeframe

3) Convene strategic alliances and public, private and nonprofit community assets in a series of inclusive and interactive forums to create a shared vision, priorities and comprehensive and holistic agenda for moving Omaha forward in all issue areas.

a) Design and facilitate forum(s) to

i) develop scenarios for collaborative methodologies

ii) develop roles and responsibilities of all community assets

iii) develop communication plans and protocols, both internal to the megacommunity and external to communities served

iv) identify collaborative funding models and opportunities

v) identify research and data gathering necessary to support the megacommunity approach

vi) identify communitywide indicators across all realms

b) Timeline and performance measurements
i) related staff special core competencies are prioritized and developed prior to conducting forum(s)  
ii) forum(s) held per duration in Timeframe  
iii) all strategic alliances and community assets developed and identified to date are present and engaged  
iv) intended results are distributed prior and achieved within the forum(s)  
v) strategic alliances and community assets provide feedback and are in majority satisfied with the activities and results

4) Identify opportunities for strategic support from OPL to resolve issues in focus areas and on specific issues
   a) Identify the content, experiences, expertise, analytics and any other resources (facilities, technologies, etc.) the Library can commit to strategically support the megacommunity approach, and plan resource allocation or development accordingly.
   b) Timeline and performance measurements  
      i) preliminary research conducted per duration in Timeframe  
      ii) resource assessment completed after Objective 3, above is completed

5) Follow up on the forum by facilitating development of shared performance measurements and community indicators among organizations within each area of focus.
   a) Indicators  
      i) Facilitate the collaborative in each focus area in developing and committing to measurements, methodologies and data protocols to support communitywide measurement of progress over time.  
      ii) Identify the statistical and/or community indicator data developed by or available to each community asset and determine whether it should and how it can be integrated into the application in Objective 2.  
      iii) Assess the duplication or overlap of effort and investment in research and data gathering or procurement among community assets and facilitate collaborative efforts and reduction in any redundancy  
      iv) Develop valid relationships between Library usage statistics and community indicators developed in 5.a.i and ii, both quantitative and qualitative.
   b) Timeline and performance measurements  
      i) completed per duration in Timeframe after forum(s) have ended  
      ii) all strategic alliances and community assets are committed to indicators, measures and methodologies

Relationships

6) Develop the Nexus network
   a) Create a community asset map, which identifies organizations/individuals (and their interrelationships) involved in resolving Omaha’s issues organized within the following focus areas:  
      i) Socioeconomic Divide  
      ii) Community and Civic Engagement  
      iii) Inclusiveness and Leadership Development  
      iv) Growth and Infrastructure Needs  
   b) Identify and engage potential strategic alliances—organizations most integral and/or significantly positioned within the larger community asset map.  
   c) Engage community assets to invite their participation in collaborative efforts and to review and obtain feedback on the proposed process for implementing Omaha’s megacommunity approach.
d) Timeline and performance measurements  
   i) community asset map preliminary draft completed within  
   ii) identification and engagement of strategic alliances completed per duration in Timeframe  
   iii) engagement of community assets completed per duration in Timeframe

Service Core

7) Begin facilitating the megacommunity collaborative efforts  
   a) provide the strategic support in each focus area and for specific issues, aligned to the communities shared vision, comprehensive agenda and priorities  
   b) Timeline and performance measurements  
      start after shared alignment to indicators, measurements and methodologies are achieved
2013-2018 NEXUS Objectives

Strategy

8) Use the Analytics application procured in Objective 2 to develop interim and annual performance measurements, communicating the information to strategic alliances, partners and community assets and facilitating course correction of activities and initiatives as appropriate.

9) Periodically assess OPL’s return on investments in its Nexus role, establishing the case for increased public and private funding as appropriate.

10) Periodically integrate OPL’s business intelligence and contextual awareness analytics to inform the megacommunity collaborative efforts.

11) Design and facilitate an annual megacommunity forum beginning one year after the first held forum. The purpose of the forum is to:
   a) Review progress
   b) Revisit the comprehensive agenda and priorities
   c) Integrate any emergent issues
   d) Plan and coordinate the next year’s activities

Relationships & Service Core

12) Continue to facilitate the collaborative efforts and provide the strategic support in each focus area and for specific issues, aligned to the communities shared vision, comprehensive agenda, and priorities.
LONG REACH Goal

100 percent of OPL’s service population will realize the return on their investment and recognize the positive impact from Library services in Omaha.

2011 – 2012 LONG REACH Objectives

Market Segmentation research drives the Long Reach strategy, retaining existing and creating new patrons through deeper understanding of lifestyles, lifestages, and niche interests. Specific content, services and experiences that meet the needs of diverse communities also increases the perceived value of the Library.

Long Reach in Motion Diagram

1) Design and begin implementation of a systemic and collaborative process for utilizing the market segmentation information to retain active patrons and reach inactive patrons and non-cardholders.
   a) Develop criteria and prioritization for pursuit of market potential identified in the market segmentation and Library use study, both systemwide and at each branch.
   b) Develop a collaborative process for developing and marketing content, experiences and services (centrally led and customized locally at branches).
   c) Clearly identify branches with the same primary market segments and create processes to collaborate and eliminate any redundancy in initiatives and efforts.
   d) Use market segmentation findings and recommendations, as well as Collection HQ and Library usage analytics, to support retaining active patrons and capturing market potential with branch specific plans of service.
   e) Identify goals and performance measurements for retaining active patrons and capturing market potential.
   f) Create processes for development of new services, experiences (to include programs) and expertise with best business practice elements of criteria for alignment to strategy, proposals for resource allocation to include time and effort beyond costs, and performance goals and measurement that require approval prior to initiation.
   g) Create processes for marketing materials which:
i) Integrate maintenance of brand discipline and organizational messaging
ii) Distribute the ability to market to target audiences to branch staff
iii) Include multiple channels and enhanced use of digital communication and social networks to distribute messaging

h) Monitor progress and correct course on plan of service implementation as necessary
i) Timeline and performance measurements
   i) process operational per duration in Timeframe
   ii) relative staff special core competencies developed per duration in Timeframe

2) Increase the annual patron usage of OPL by 10 percent
   a) usage as defined by:
      i) checkout of materials
      ii) program attendance
      iii) technology access
      iv) in-Library use and service, and use of facilities
   b) develop methodologies for authenticating patron usage beyond material checkouts using the new ILS and supplemented by other technologies or processes as necessary and where feasible.
   c) Timeline and performance measurements
      i) aligned to ILS implementation, with a bridge strategy in place to authenticate program attendance if necessary

3) Utilize the ILS and supplemental tools if necessary (see relational database contact management in Nexus role) to create and manage patron relationships beyond cardholder account issues, to include marketing, satisfaction feedback and emergent needs.

4) Initiate a collaborative research project with appropriate strategic alliances
   a) Intended results are to define the relationship between strong public libraries and community indicators, with information specific to Omaha where available.
   b) Indicators may include, but are not limited to:
      i) readiness to learn; early childhood literacy
      ii) basic literacy; information and other life literacies
      iii) educational achievement and attainment; lifelong learning
      iv) intergenerational interaction and benefits
      v) health and wellness
      vi) increased patronage of the arts and culture
      vii) recreational activities at no or very low cost
      viii) affect on crime and in an area; affect on high risk youth
      ix) entrepreneurial and small business success rates; economic development and growth
      x) civic and community engagement
      xi) maintenance or improvement in property values
   c) Timeline and performance measurements
2013 – 2018 LONG REACH Objectives

5) Develop a communication plan for strategically sharing the research outcome with patrons, strategic alliances, partners, public agencies and communities served.

6) Periodically assess OPL’s return on investments in its Long Reach strategy, establishing the case for increased public and private funding as appropriate.

7) Periodically integrate OPL’s business intelligence and contextual awareness analytics to inform the Long Reach efforts and evolve the strategy as appropriate.

8) Continue implementing system wide and branch specific plans of service, with periodic updates of Library usage statistics and annual refresh of market segmentation data.
## Timeframe

### OPL Strategic Plan 2011

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
<th>Dependencies</th>
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<tbody>
<tr>
<td><strong>1) Organizational Advancement</strong></td>
<td>22w</td>
<td></td>
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<tr>
<td>1.1) Staff Development and Utilization Plan</td>
<td>19w</td>
<td></td>
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<tr>
<td>1.1.1) Develop Core Competencies</td>
<td>19w</td>
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<tr>
<td>1.1.2) Develop Special Competencies</td>
<td>19w</td>
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<tr>
<td>1.1.3) Create OPL Leadership Development Plan</td>
<td>19w</td>
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<tr>
<td>1.2) Create Organizational Capacity</td>
<td>13w</td>
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<tr>
<td>1.2.1) Evaluate Organizational Processes and Activities</td>
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<td>1.2.1.2) Review Staff Classification Across Classifications and Align to New Roles</td>
<td>13w</td>
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<td><strong>1.3) Develop Patron Services within Service Core</strong></td>
<td>8w</td>
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<tr>
<td>1.3.1) Create Service Philosophies and Training Program</td>
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<td><strong>1.4) Develop Strategy / Relationships Elements of the Strategic Service Model</strong></td>
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<tr>
<td>1.4.1) Strategy</td>
<td>8w</td>
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<tr>
<td>1.4.1.1) Design Process for Business Intelligence</td>
<td>8w</td>
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<tr>
<td>1.4.1.2) Design Process for Technology Foresight</td>
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<td>1.4.1.3) Design Process for Contextual Awareness</td>
<td>8w</td>
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<tr>
<td>1.4.1.4) Develop Strategic Financing Perspective</td>
<td>8w</td>
<td></td>
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<tr>
<td>1.4.2) Develop Continual Strategic Planning Process</td>
<td>8w</td>
<td></td>
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<tr>
<td>1.4.3) Relationships</td>
<td>3w</td>
<td></td>
</tr>
<tr>
<td>1.4.3.1) Clarify and Communicate Roles</td>
<td>3w</td>
<td></td>
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<tr>
<td>1.4.3.2) Develop Processes and Procedures</td>
<td>3w</td>
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<tr>
<td><strong>1.5) Review and Align Facilities Master Plan</strong></td>
<td>22w</td>
<td></td>
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<tr>
<td>1.5.1) Create Capital Improvement Program</td>
<td>6w</td>
<td></td>
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<td>1.5.2) Develop Criteria for Project Prioritization to Core Strategies</td>
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</tr>
<tr>
<td>1.5.3) Develop Model for Spatial Brand</td>
<td>14w</td>
<td>1.5.2</td>
</tr>
<tr>
<td><strong>1.6) Develop Library Services within Service Core</strong></td>
<td>8w</td>
<td></td>
</tr>
<tr>
<td>1.6.1) Develop Hybrid Centralized Program Development/Delivery Model</td>
<td>8w</td>
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<tr>
<td>1.6.2) Develop Library Reference Services Model</td>
<td>8w</td>
<td></td>
</tr>
<tr>
<td>1.6.3) Develop Website as Virtual Branch</td>
<td>8w</td>
<td></td>
</tr>
<tr>
<td>1.6.4) Develop Outreach Services Program</td>
<td>8w</td>
<td></td>
</tr>
<tr>
<td><strong>1.7) Develop Content Development within Service Core</strong></td>
<td>8w</td>
<td></td>
</tr>
<tr>
<td>1.7.1) Create Hybrid Centralized Content Development Model</td>
<td>4w</td>
<td></td>
</tr>
<tr>
<td>1.7.2) Create Resource Allocation Model and Align to Core Strategies</td>
<td>4w</td>
<td>1.7.1</td>
</tr>
<tr>
<td><strong>1.8) Align ILS within Service Core</strong></td>
<td>16w</td>
<td></td>
</tr>
<tr>
<td>1.8.1) Evaluate Patron Service Opportunities and Implement Features</td>
<td>12w</td>
<td></td>
</tr>
<tr>
<td>1.8.2) Evaluate Business Intelligence Needs and Implement Processes</td>
<td>8w</td>
<td>1.4.1.1</td>
</tr>
<tr>
<td>1.9) Refine Business Management within Service Core</td>
<td>12w</td>
<td></td>
</tr>
<tr>
<td>1.9.1) Clarify and Communicate Roles</td>
<td>4w</td>
<td></td>
</tr>
<tr>
<td>1.9.2) Develop Additional Processes</td>
<td>8w</td>
<td>1.9.1</td>
</tr>
<tr>
<td>1.9.3) Develop Accountability and Performance Measures</td>
<td>8w</td>
<td>1.9.1</td>
</tr>
<tr>
<td><strong>2) Nexus</strong></td>
<td>75w 2d</td>
<td></td>
</tr>
<tr>
<td>2.1) Develop the Nexus Network</td>
<td>18w</td>
<td></td>
</tr>
<tr>
<td>2.1.1) Create Community Asset Map</td>
<td>6w</td>
<td>1.4.3.2</td>
</tr>
<tr>
<td>2.1.2) Identify and Engage Strategic Alliances</td>
<td>12w</td>
<td>2.1.1</td>
</tr>
<tr>
<td>2.1.3) Engage Community Assets</td>
<td>12w</td>
<td>2.1.1</td>
</tr>
<tr>
<td>2.1.4) Develop Timeline and Performance Measures</td>
<td>6w</td>
<td>2.1.1</td>
</tr>
<tr>
<td>2.2) Develop / Procure Analytics Application</td>
<td>8w</td>
<td></td>
</tr>
<tr>
<td>2.3) Design Proposed Process with Strategic Alliances</td>
<td>20w</td>
<td></td>
</tr>
<tr>
<td>2.3.1) Develop Roadmap, Participants, Activities and Interrelationships</td>
<td>2w</td>
<td>2.1.3</td>
</tr>
<tr>
<td>2.3.2) Develop and Implement Pilot Project</td>
<td>18w</td>
<td>2.3.1</td>
</tr>
<tr>
<td>2.4) Develop OPL Strategic Support</td>
<td>4w</td>
<td>2.3.1</td>
</tr>
</tbody>
</table>
2.5) Facilitate Nexus Network Conference
   - 2.5.1) Convene Nexus Network
   - 2.5.2) Develop Community Indicators / Performance Measurements in Nexus Network

2.6) Begin Facilitating the Megacommunity Approach
   - 2.6.1) Facilitate Ongoing Efforts
   - 2.6.2) Develop and Implement Strategic Support
   - 2.6.3) Develop Timeline and Performance Measurements / Indicators

3) Long Reach
   - 3.1) Design and Implement Systemic Long Reach Process
     - 3.1.1) Develop Process for Data Mining of Market Segmentation
       - 3.1.1.1) Develop Criteria for Target Markets
       - 3.1.1.2) Identify Branch Specific Collaborations
       - 3.1.1.3) Develop Goals for Market Potential
       - 3.1.1.4) Create Marketing Materials Toolkit
     - 3.1.2) Facilitate Ongoing Efforts

   - 3.2) Increase Annual Patronage by 10%
     - 3.2.1) Develop Methodologies for Use Authentication
     - 3.3) Initiate a Collaborative Research Project (Nexus Network) on OPL Value
Appendix Content

Supplemental studies, demographics, iterative work, and memoranda for outreach performed throughout the planning process are contained in an Appendix to this document. Please note the appendix is a separate document. The table of contents is included here for reference.

Appendix Table of Contents

1. OPL Library Use Study, CivicTechnologies
2. Demographic Tables – Omaha and Douglas County, Nebraska
3. Outreach Memoranda (Survey, Focus Groups, and Community Forums)
4. Insight Interviews Summary
5. Staff Survey Summary
7. Library Comparative Analyses
8. Resources and Reference
   i) The Connected Community: Local Governments as Partners in Citizen Engagement and Community Building, James H. Svara and Janet Denhardt, Editors Arizona State University, October 15, 2010 (Reprinting or reuse of this document is subject to the “Fair Use” principal. Reproduction of any substantial portion of the document should include credit to the Alliance for Innovation.)
   ii) Building the Organizations That Build Communities, Strengthening the Capacity of Faith- and Community-Based Development Organizations, Roland V. Anglin, Editor
   iii) Innovate the Steve Jobs Way, 7 insanely different principles for breakthrough success, Carmine Gallo, Columnist, BusinessWeek.com
Lexicon

GIS

A Geographic Information System maps datasets to geographic locations. Automobiles are equipped with navigation systems that rely upon GIS technologies and information to guide a user to a destination. In the Nexus strategy, GIS technologies will facilitate the layering of community indicators (demographics, socioeconomic data, health and wellness data, educational success data, etc.) and provide a community wide picture of the collaborative efforts of strategic alliances and community assets. In the Long Reach strategy, GIS technologies locate different market segments at the census block level relative to OPL neighborhood branches. Staff can then mine this data for localized development of content, services, and experiences tailored to these segments.

insight interviews

40 personal interviews were held with community leaders to provide insight and perspective within the analytics phase of the strategic planning process. Individuals who either broadly represent the community or a special interest area or group were asked to speak for the community in general, but also for their specific affiliations with special groups, organizations, or interests. Rather than focusing on library specific topics, this group voiced the larger issues that they believe confront OPL’s communities today and on the horizon, and what they believe the most critical issues are to the communities and their quality of life. A summary of these interviews is located in the Appendix to this document (see Appendix content).

matrix organizational concept

OPL has a formal, hierarchical structure where everyone in the organization (except the final authority) reports to a manager or executive. This is usually illustrated in a top down organizational chart, where layers of management and reporting are reflected in an almost pyramidal manner and it is clear that one entity is ultimately responsible for all in the organization. This is not unusual in the public sector, nor should it be changed, as public sector organizational structures and union agreements set the parameters for governance.

A matrix organizational concept is a functional approach to creating and using teams to achieve complex projects or processes across an organization, regardless of department or management. One individual may belong to a number of teams, each working on separate projects, but that person shouldn’t necessarily report to more than one supervisor. Employing a matrix concept requires collaboration among supervisors to ensure that all activities of staff are accounted for and performance is measured.

High performing matrix organizations create accountability at the team, and not individual level. Team accountability to goals and objectives essentially means that if the team succeeds, each team member succeeds in meeting their performance measures. Conversely, if the team fails to meet its goals, all members of the team do as well.

Matrix organizations are often used in the military, defense, engineering and product development realms, where staff are grouped by function or expertise and the workloads (projects) create peaks and valleys of effort. People and resources are reallocated dependent upon the workload and specific expertise.

megacommunity approach

This concept has emerged over the past few years as a collaborative approach to resolving societal issues by uniting the public, private, non-governmental and non-profit sectors in addressing problems that must be resolved for communities to be healthy and thrive.
From the strategy + business article:

"Cybersecurity. Hunger. Energy. Education. These are challenges for civilization that can seem overwhelming. They are deep-rooted and highly complex. They have global reach and global repercussions. And they call for game-changing strides in policy and innovation. Many organizations in many sectors have been working diligently on each of these challenges for years, or decades; many others know they should be. But in most cases, even the most well-intentioned and capable organizations, when working separately, eventually hit a wall limiting their effectiveness…

These organizations have boldly embraced the *megacommunity* approach — which calls for companies, governments, and NGOs to reach out across sectors (private, government, and civil society) and join together to take action… Like any business environment, a megacommunity contains organizations that sometimes compete and sometimes collaborate. And like any business organization, it requires structure, communication, and governance. It’s an approach that admits that certain crucial problems can be solved only by a combination of organizations (a network of networks, if you will) that can bring many different capacities and points of view to bear."


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**net consumption-use equation**

A net consumption-use equation reflects the act of using, or consuming, resources within an ecosystem at a rate no greater than one’s inputs and/or the ability of the ecosystem to generate replacement resources. A net zero impact consumption-use equation is sustainable, where a negative consumption-use equation depletes the ecosystem and is not sustainable. A positive consumption-use equation contributes more to the ecosystem than is consumed and therefore adds value.

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**outcome measurements**

Outcomes are the consequences or results of a service, activity, intervention, or program, and not the actual activity or work done. These results are often a change in condition and/or improvement in quality of life for the client or user.

Outcome measurements require the tracking of specific indicators that represent progress, or lack thereof, toward intended outcomes. Indicators for community literacy might include educational success and attainment, workforce readiness, improved incomes, etc.

Please refer to *Key Steps in Outcome Management* developed by the Urban Institute [http://www.urban.org/UploadedPDF/310776_KeySteps.pdf](http://www.urban.org/UploadedPDF/310776_KeySteps.pdf)

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**process design and planning**

“*If you don’t know where you are going, any road will get you there.*” — Lewis Carroll

Process design uses an intentional and mindful approach to developing a means (activities) to an end (intended result). Simple processes like submitting expenses may be depicted in a linear, outline form that depict steps in a prescribed sequence to comply with requirements and achieve a successful result. More complex processes, especially those that engage multiple stakeholders and even whole communities, require much more attention to detail than simple compliance with requirements.

Process design includes asking and answering the following questions:

- why is a process necessary – what is the intended result?
• who is involved, why, how, and when?
• what activities are required and/or desired to achieve the intended result?
• how are the activities interrelated - in what sequence should they occur?
• when will the intended result be accomplished?
• where will activities occur?

For more complex processes, a flow diagram or roadmap may help people visualize the activities and their interrelationships more easily than an outline. A visual also presents the opportunity to show progress toward goals as in the following roadmap developed for OPL’s strategic planning process:

- The left-most ‘column’ represents groups of participants
- The bar along the top represents the timeframe for design and development of the Strategic Plan
- The boxes in the body of the process map represent specific activities, their logical sequencing, and their interrelationships - all designed to achieve a coherent flow of data gathering, information development and analysis, exploration and discovery, and ultimately informed decision-making

Ideally, process design involves those who will be affected and those responsible for execution using an interactive design forum to develop the answers to the why, who, what, how, when and where questions outlined above. Collaborative process design often results in richer processes that anticipate issues and leave no one who should be involved behind.

Mapping a process and explaining each activity also facilitates the development of scope (level of effort), resources required, and the duration of each activity and the process as a whole.
**project planning and management**

Project planning begins with clear goals and objectives, the why question that defines the purpose of the project. Planning also requires the identification of any other parameters that will affect the work done (schedule constraints, resource availability, budgets, etc.). Much like the process design defined above, who should be involved, what activities will need to occur, how and when these activities need to be completed, and where they will occur must be developed and documented.

Project planning and management is both art and science, although a simple equation illustrates the key ingredients to any successful project: the right people, doing the right things, at the right time.

Projects may also be mapped as processes, but once a project goal is determined most managers use project management software to develop the tasks, dependencies, critical path, resources, and schedule.

In high performance organizations, projects are facilitated, not managed. Project managers rely upon their teams to be accountable to clear goals and each other, and the monitoring, reporting, and course correction activities of project management can be accomplished within and by the team doing the work. Project facilitators are then responsible for performance measurement and ensuring the team has what it needs to be successful, as well as crediting and rewarding those responsible for successful execution.

**social entrepreneur**

"Social entrepreneurs are individuals with innovative solutions to society's most pressing social problems. They are ambitious and persistent, tackling major social issues and offering new ideas for wide-scale change.

Rather than leaving societal needs to the government or business sectors, social entrepreneurs find what is not working and solve the problem by changing the system, spreading the solution, and persuading entire societies to take new leaps. Social entrepreneurs often seem to be possessed by their ideas, committing their lives to changing the direction of their field. They are both visionaries and ultimate realists, concerned with the practical implementation of their vision above all else.

Each social entrepreneur presents ideas that are user-friendly, understandable, ethical, and engage widespread support in order to maximize the number of local people that will stand up, seize their idea, and implement with it. In other words, every leading social entrepreneur is a mass recruiter of local changemakers - a role model proving that citizens who channel their passion into action can do almost anything." – Ashoka

"the continuous energy to imagine, innovate, implement, improve on innovation, scale up, diversify, defy the usual, break the patterns, move in a new direction . . . that exhausting and exhilarating quality of what makes a social entrepreneur . . . no training course will ever teach that." - Schwab Foundation

**triple bottom line**

"In 2007, the United Nations and ICLEI (International Council for Local Environmental Initiatives) ratified the Triple Bottom Line (TBL or 3BL) standard for urban and community accounting (beyond financials to include impact to people and the environment) in the public sector. The phrase is attributed to John Elkington, in the article "Toward the Sustainable Corporation: Win-Win business strategies for sustainable development" for
the California Management Review (Elkington, 1994). The conversation on sustainability has since broadened to include three frameworks to describe TBL:

- people, planet, and prosperity
- economy, environment, and equity
- economic, social, and ecological responsibility

Essentially, rather than accounting only for financial performance, an organization includes in its reporting their social and environmental performance as well. Therefore, the organizational picture is broadened to include impact to the quality of life for people in the community as well as the impact to the quality of the environment. All three of these elements are included in the sum total of performance, which effectively creates a more systemic approach to analysis. If an action taken or service provided by government is economically successful (benefit to citizenry is deemed worthy of investment by the government), but it is detrimental to the environment, then it may not actually be viewed as successful when all three realms are considered.

Many governmental bodies have adopted performance measurement accounting practices as a step beyond traditional financial and operational accounting. The performance approach uses a metric, such as cost per unit, as a basis for measuring activities and providing a means to assess activities through an input, output, outcome, and efficiency oriented lens. In June of 2009, the Governmental Accounting Standards Board (GASB) of the Financial Accounting Foundation issued proposed Suggested Guidelines for Voluntary Reporting—SEA Performance Information for comment. SEA is an acronym for Service Efforts and Accomplishments, which according to the GASB “could include how efficiently or cost effectively roads were paved, how well children were educated, or the impact of police services on crime, and how that performance may have changed over time.” The suggested guidelines provide a process and concepts for state and local governments to implement performance measuring accounting practices.

Libraries are well versed in accounting for inputs and outputs, but many do not explore the outcomes and efficiencies. So many staff hours and dollars are expended to create a program, and 1,000 people attend. You could divide 1,000 by the value of time and expenses to arrive at a cost per person for the program. If that cost per person seemed reasonable by whatever your criteria, you would deem your event successful. If only 10 people attended, you may not. But let us imagine that the program was entitled “Got Water? Get Waterwise!” The focus was on conservation due to the region’s third year of drought, and each of the 750 families represented in the 1,000 people in attendance saved on average $10.00 over the next year by implementing what they learned at the program. The value to the community was a direct $7,500.00 in savings to the families, greater awareness of the issues associated with the supply of water, and maybe even voluntary rather than required water conservation. Because the voluntary conservation did not require enforcement, the local water district and government saved the administrative dollars necessary to police the mandate. The perspective on “outcome” rather than just “output” as well as the “efficiency” of this program just skyrocketed.”

wayfinding

Wayfinding refers to how people orient themselves and navigate the built environment. Excellent design and minimal signage is the better approach to intuitive wayfinding, but often organizations resort to excessive signage to address deficiencies in design. Too much signage is overwhelming and confusing; design elements that utilize the concepts of progression through space, demarcation of different zones of activity, and visual and tactile clues for users (changes in material, lighting, spatiality, views, etc.) are more effective.
Endnotes


3. In Type I technical work, the problem is clearly identified and proven solutions exist – one just needs an accomplished or expert individual to apply the solution to the problem. It is simple to identify a blown tire, and someone who is mechanical or trained to replace the tire can easily fix the problem – done. The primary focus of responsibility for the work is the mechanic. In a library, where a fine prohibits further checkout, staff can collect the fine, clear the record, and checkout the material to the patron - done.

In Type II, technical to adaptive work, the problem is clear but the solution may require learning or change because it is not as clear-cut as in technical work. The person with the problem and whoever can apply a solution must work together. If this is the medical profession, and a patient has a heart problem, the doctor can present options to resolve the problem. However, if the individual does not continue to follow prescription regimens, or to change his lifestyle, the solution will not resolve the problem long term. This responsibility for the work is both the doctor and the patient's and the patient must change his behavior.

Type III work is adaptive, where both the problem and its solution requires learning for all involved as the problems are not clear-cut and the fixes are not technical. Learning is required for both the problem definition and development of the solution, as well as its implementation. This is extremely collaborative, and situation specific, work. In a library, a woman may ask a reference librarian to help her find information on breast cancer, but is really wondering if she will survive and if not how will her children live without her. A dedicated professional will detect the nuance, and while not a doctor or counselor, can offer supplemental information and resource referrals to help the woman with these unasked and unanswered questions.


. “Americans see and appreciate the value of librarians. The vast majority (83%) of Americans who have used a librarian agree librarians add value to the search process... even more so than in 2005 (76%). Respondents who had experienced a negative job impact rate librarians even higher, with 88% indicating the librarian adds value to the search process.”


http://www.strengthsfinder.com


