



Where People Connect,
Communities Achieve

Guide to Using **Edge**

Managed by the Urban Libraries Council



The Urban Libraries Council (ULC) is the premier membership organization of North America's leading public library systems. ULC is deeply invested in identifying and advancing the ways in which public libraries contribute to improving education outcomes for all learners. With the help of its members, ULC publishes briefs and reports, presents webinars and workshops, convenes key local and national leaders and initiates projects that advance libraries' work in education, digital inclusion and building healthy, sustainable communities.

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Welcome to Edge

A MESSAGE FROM ULC PRESIDENT AND CEO, SUSAN BENTON

Dear Library Leader,

Public libraries support the education, workforce and health and wellness needs of the individuals and communities we serve by providing free access to technology and the internet. We are the agent for digital inclusion and equity, yet it can be challenging to know how to best upgrade our technology, programs and services to meet the ever-changing needs of the public.

Recognizing the need for libraries to make informed decisions on public technology and to have the ability to describe the importance of their work to community leaders, the Bill & Melinda Gates Foundation invested over \$15 million in the development of Edge.

Edge provides public libraries and their funders the data for continuously evaluating and advancing their public technology, programs and services so that their residents and communities have what they need to prosper in the 21st century economy and society. Edge is the first benchmarking system aimed at assessing the library's technology and to provide a path for continuous enhancement.

Today, 2,100 public libraries use Edge in the United States and Canada.

Edge provides the data we need to measure our progress year-over-year and to tell our story. It enables us to identify where we are strong and where we need to build capacity. Edge enables us to make resource and staffing decisions. And importantly, Edge provides the quantitative and qualitative information needed to help the leaders in our community understand the essential value of our services.

This is exciting work and we look forward to working with you!

Sincerely,

Susan Benton

President and CEO, Urban Libraries Council

About Edge

Imagine having an expert in public libraries visit your library. The expert carefully looks at everything your library is doing, then provides you with a report that assesses strengths, gaps and areas of improvement. To help plan improvements, you receive recommendations based on your results. This is all supported by a set of resources that will help the library successfully implement the improvements recommended by the expert. Finally, the expert helps you communicate how library technology supports community priorities.

Edge does this – except you have the flexibility to manage the entire process directly from your library with the support of the Edge Staff at your fingertips.

Prepare for Edge

Edge subscriptions provide libraries with 12-month access to the tools, resources and learning opportunities to support their work in meeting their community's needs. Below are tips to help you prepare for successfully engaging with Edge:

- Determine who will be working on Edge, specifically staff or volunteers that have in-depth knowledge of the library's technology, programs, services, partnerships and operations.
- Familiarize yourself with the four steps of Edge and begin thinking about the time required to successfully engage with each step.
- Review the Edge Strategic Areas and the Edge Benchmarks to learn about the specific focus of Edge.
- Plan to participate in the Edge Learning Opportunities associated with each step to receive guidance and support for successful engagement with Edge.
- Explore the various components of your online access to Edge, including each feature of your library's Edge Dashboard.

Libraries of all sizes across North America are using Edge to successfully strengthen and improve technology services to support the local economy, workforce, lifelong learning and strong communities.

Edge Project Teams

Many participating libraries form an Edge Project Team. These teams are recommended for all libraries, especially those with multiple branches. Participating on the Edge Project Team provides library staff and volunteers with an opportunity for professional growth and development. The team typically consists of two to four library staff or volunteers who have in-depth knowledge of the library's technology, programs, services, partnerships and operations.

Edge Project Leaders manage the Edge Project Teams. In addition to having in-depth knowledge about the library, these individuals should have the following skills:

- Excellent project management skills and the ability to lead a small team
- Outstanding communication and presentation abilities
- A solid understanding of how the library meets community priorities

Getting Started with Edge

Edge is a four-step, resource-rich toolkit that helps library leaders wisely make technology improvement decisions. These steps guide libraries to set measurable, strategic goals for digital inclusion and to engage government and community leaders in a meaningful discussion about technology needs and plans.

Step 1 – Assess

Take an online assessment to identify strengths, gaps and areas of improvement for technology infrastructure and services. Criteria are based on 11 national benchmarks that gauge community value, stakeholder engagement and organizational management.

Step 2 – Plan

Review assessment data and select recommendations to create an Action Plan.

Step 3 – Implement

Use the Action Plan as a roadmap to strengthen technology services to meet community priorities.

Step 4 – Communicate

Engage local leaders and communicate how library technology supports community priorities.

Assess

Plan

Implement

Communicate



Step 1 – Assess

During Step 1, libraries take an online assessment to identify strengths, gaps and areas of improvement for technology infrastructure and services. Criteria are based on 11 national benchmarks that gauge community value, stakeholder engagement and organizational management.

PHASE I

Library explores the various components of the Edge framework and completes Edge Assessment

Exploring the tools, resources and learning opportunities available through Edge prepares libraries for gathering the necessary information and allows them to effectively plan the time commitment for the subscription period.

Edge begins with a 156 question self-assessment that requires libraries to answer questions regarding the library's technology, programs, services, partnerships and operations. Printing the Edge Assessment Workbook will allow the library to gather data on a printed version of the Edge Assessment, providing the flexibility to work on it while not logged into the Edge Dashboard. Once the responses are collected, it only takes 30-45 minutes to transfer the data to the online version of the Edge Assessment.

PHASE II

Library reviews Edge Assessment Results and additional reports

The library reviews all aspects of the Edge Assessment Results, Edge Peer Comparison Report and the Edge National Peer Attribute Report. The library reviews this information with a focus on the following:

- The data gathering and entry process
- Information and trends from the Edge Assessment Results, Edge Peer Comparison Report and the Edge National Peer Attribute Report
- Initial observations, questions and evaluation of the data and results including any data entry errors, surprises and alignment with expectations

EDGE PROJECT TEAMS

Edge Project Leaders delegate portions of the Edge Assessment to members of the Edge Project Team. Before entering the final data into the online version of the Edge Assessment, the entire Edge Project Team meets to analyze and discuss the data each person gathered. This leads to the presentation that is given to the library's leadership team that summarizes the process and findings from Step 1.

The following Edge Tools, Resources and Learning Opportunities are available to support libraries during **Step 1 – Assess:**

- Edge Benchmarks
- Edge Assessment (Workbook and Online)
- Edge Answer Key
- Edge Assessment Results
- Edge Live Office Hours
- Using Edge | Step 1 – Assess

Step 2 – Plan

During Step 2, libraries review assessment data and select recommendations to create an Action Plan. This should be based on the data uncovered in the Edge Assessment Results, Edge Peer Comparison Report and Edge National Peer Attribute Report.

PHASE I

Library reviews Edge Assessment Results and sets priorities

The library reviews the Edge Assessment Results and the two companion reports. While reviewing this information, it is important to focus on the following:

- Any data considered surprising or concerning
- Specific sections of the reports that highlight areas of need or areas of achievement
- Priorities for the library and areas that are covered in the library's strategic plan

The priorities identified by the library are the building blocks used to create an Edge Action Plan, the roadmap for strengthening and developing technology services to meet specific community priorities.

PHASE II

Library reviews and approves Edge Action Plan

The library drafts an Edge Action Plan based on the identified priorities as well as the Edge Recommendations that result from the library's responses to the Edge Assessment. The Edge Action Plan should include 10-15 Edge Recommendations to improve technology services. Libraries filter the Edge Recommendations by Strategic Area, Benchmark or by the three levels of difficulty (1-3, where 1 is easiest and 3 is most difficult). The draft Edge Action Plan should be considered in conjunction with the library's strategic plan and support the city or county's strategic priorities. Once the draft Edge Action Plan is approved, the library uses the Edge Resources to plan the implementation.

EDGE PROJECT TEAMS

Edge Project Leaders are responsible for scheduling and leading several meetings with the Edge Project Team and the library's leadership team to answer questions, establish consensus on priorities and develop a draft of the Edge Action Plan. It is critical to present the draft Edge Action Plan to the library's leadership team for approval before it is finalized, ensuring all priorities are aligned with the library's strategic plan and are focused on the community's priorities.

The following Edge Tools, Resources and Learning Opportunities are available to support libraries during Step 2 – Plan:

- Edge Assessment Results
- Edge Peer Comparison Report
- Edge National Peer Attribute Report
- Edge Recommendations
- Edge Action Plan
- Edge Live Office Hours
- Using Edge | Step 2 – Plan

Step 3 – Implement

During Step 3, libraries use the Edge Action Plan as a roadmap to strengthen technology services to meet community priorities.

PHASE I

Library plans implementation

The library plans its approach to implementing the Edge Action Plan to ensure it is meeting community priorities. To do this, libraries focus on the 10-15 Edge Recommendations that were added to the Edge Action Plan. The planning process should focus on the following:

- Including improvements from each of the three Strategic Areas
- Achieving Level 1 improvements (these are considered foundational for all libraries and typically require the least amount of time, money and staff)
- Supporting the city or county's strategic priorities

During this phase, the library refers to the Edge Resources associated with each of the recommendations to gain more information and identify leading practices to support the work needed to address these improvements.

As part of Step 3, the library creates a list of required activities, a timeline for completion and information about assigned responsibilities.

PHASE II

Library reviews plan for implementation, sets priorities and takes action

After the plan is approved and all associated documents are reviewed, the library prioritizes which activities are time sensitive and plans accordingly. Based on the information provided in the Edge Resources, the library takes the appropriate actions to implement the improvements. The library monitors and updates its Edge Action Plan each quarter, triggering the library to begin thinking about how it will communicate its work with Edge.

EDGE PROJECT TEAMS

Edge Project Teams work with Edge Project Leaders to plan the implementation process. This requires discussions before the implementation plan is presented for approval. Ask the library's leadership team to point out any priorities that stand out or take precedence. It is important to ensure the Edge Action Plan reflects and supports the priorities of the library's leadership team and the community's priorities.

The following Edge Tools, Resources and Learning Opportunities are available to support libraries during **Step 3 – Implement:**

- Edge Resources
 - Edge Library Profiles
 - Edge Live Office Hours
 - Edge Self-Paced Learning Opportunities
 - Using Edge | Step 3 – Implement
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Step 4 – Communicate

During Step 4, libraries engage local leaders and communicate how library technology supports community priorities.

PHASE I

Library develops internal engagement strategies

The library develops internal engagement strategies to communicate its work using technology to meet community priorities. The library presents to library staff, volunteers or other internal stakeholders. This presentation should focus on the following:

- An overview of the Edge process and key findings based on the Edge Assessment Results
- Details about the Edge Action Plan and the planning process
- Responsibilities and implementation procedures regarding the Edge Action Plan

PHASE II

Library develops external engagement strategies

External presentations are intended for key local government officials, prospective and existing community partners and other community leaders. These provide an overview of key findings and how the library's work relates to city or county strategic priorities, showcasing how the library supports the local economy, workforce, lifelong learning and strong communities. This is also an opportunity to highlight the work accomplished to set measurable, strategic goals for digital inclusion and to engage local government and community leaders in meaningful discussion about technology needs and plans.

The presentations include information from the peer comparison reports, examples of best practices and areas where the library can use technology to result in improved outcomes. This is an ideal time for the library to present opportunities for enhancing its capacity.

EDGE PROJECT TEAMS

Edge Project Teams contribute to the development of the library's engagement strategies, but the process is managed by the Edge Project Leader. The Edge Project Leader must meet with the library's leadership team to actively discuss the final development of engagement strategies, leading to the creation of a list of engagement activities, a timeline for completion and information about assigned responsibilities.

The following Edge Tools, Resources and Learning Opportunities are available to support libraries during **Step 4 – Communicate:**

- Updated Edge Action Plan
- Edge Reporting and Presentation Tools
 - One-Page Leave Behind
 - Two PowerPoint Templates
- Edge Live Office Hours
- Using Edge | Step 4 – Communicate

EDGE BENCHMARKS

The Edge Benchmarks are the first set of technology benchmarks for the library field. They are categorized into three strategic areas that focus on strengthening the library as it supports the local economy, workforce, lifelong learning and strong communities.

2,100 libraries
participated in Edge
through an individual
or a statewide
subscription
in 2016.

Community Value

Libraries provide programs and services that advance community priorities and enable people to use technology to improve the quality of their lives.

Benchmark 1: Digital literacy

Libraries provide assistance and training with the goal of increasing the level of digital literacy in the community.

Benchmark 2: Digital tools and resources

Libraries provide access to relevant digital content and enable community members to create their own digital content.

Benchmark 3: Meeting key community needs

Libraries provide technology resources to help patrons meet important needs related to personal goals and community priorities.

Engaging the Community and Decision Makers

Libraries are a valuable resource and a strategic partner in helping people and communities improve their quality of life.

Benchmark 4: Strategy and evaluation

Libraries make strategic decisions based on community priorities for digital inclusion.

Benchmark 5: Strategic partnerships

Libraries build strategic relationships with community partners to maximize technology resources and services provided to the community.

Benchmark 6: Sharing best practices

Libraries support continuous improvement in technology services by sharing expertise and best practices with other digital inclusion organizations.

Organizational Management

Libraries manage resources so that members of the community who need or want access can get it regardless of ability, skill, personal technology or available time.

Benchmark 7: Planning and policies

Libraries integrate technology into planning and policies.

Benchmark 8: Staff expertise

Libraries have sufficient staff with technology expertise to help patrons achieve their goals.

Benchmark 9: Devices and bandwidth

Libraries have sufficient devices and bandwidth to accommodate user demand.

Benchmark 10: Technology management

Libraries manage their technology resources to maximize quality.

Benchmark 11: Technology inclusiveness

Libraries ensure participation in digital technology for patrons.



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