

TRACKING YOLO COUNTY'S 2024-2028 STRATEGIC PLAN

Final Presentation - March 11, 2025



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Meet the Team



Sheena Ryan
Team Lead



Matthew Huang



Aaron Stiles



Ishwinder Hundal

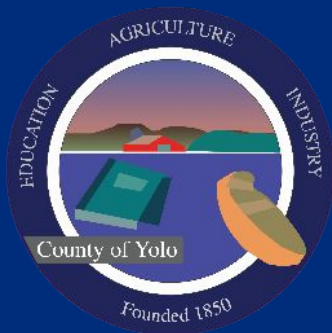


Marybeth Kavanaugh
Faculty Advisor

Your Ask

Yolo County initiated this project to:

Create a tailored dashboard framework that aligns with the pillars of Yolo County's 2024-2028 Strategic Plan



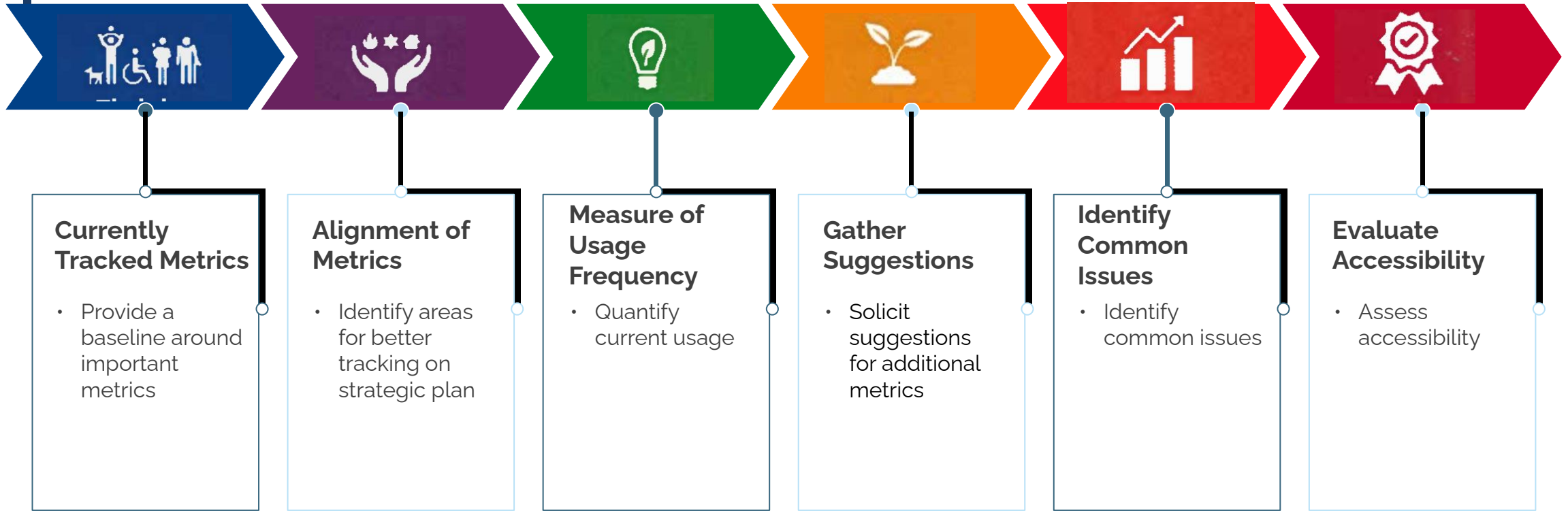
Recap of Interim Meeting

- Identify key metrics, evaluate tracking methods, benchmark best practice from other countries
- Reviewed insights from interviews and survey
- Discussed preliminary dashboard approaches
- Set next steps towards finishing research delivering mockups

Milestones



Follow-Up



Research Methodology and Initial Findings



Understanding the Current State

- Assessed how Yolo County currently tracks progress on its 2024-2028 Strategic Plan
- Identified challenges, gaps, and inefficiencies in reporting
- Conducted an initial **survey**

Internal Research & Data Collection

- Conducted internal interviews with key departments
- Focused on how departments define success, track initiatives, and what tools they use.

External Benchmarking & Comparative Analysis

- Identified comparable counties for benchmarking
- Reviewed their strategic plans, tracking systems, reporting frequencies, and public dashboards

Researching Dashboard Solutions

- Evaluated existing tracking tools and dashboard solutions (*Monday Work Management, Cascade, Envisio*)
- Assessed potential features, automation capabilities, and feasibility for Yolo County

Developing Mockups

- Created **early-stage dashboard prototypes** based on research findings
- Incorporated department feedback

Employee Interview Tally List & 5C's Analysis

5C's Framework

Company

- Local government entity focused on providing services to the community.
- Autonomous departments with goals based on strategic initiatives or fidelity.

Customers

- Internal employees
 - Tracks, implements, and reports on initiatives.
 - Utilization of manual data collection.
- External Stakeholders
 - Public facing dashboard for transparency.
 - Outlining public desired metrics

Context

- Data Collection from Internal Sources
 - Collection of data from internal departments
 - Quantitative and qualitative data
- State and Federal Fidelity Requirements Driven

How frequently do you access the current dashboard to monitor metrics?



What specific metrics or data would help better track the progress of the pillar(s) you've selected?

Dashboards that easily accessible for managers to manage and track performance beyond spreadsheets.

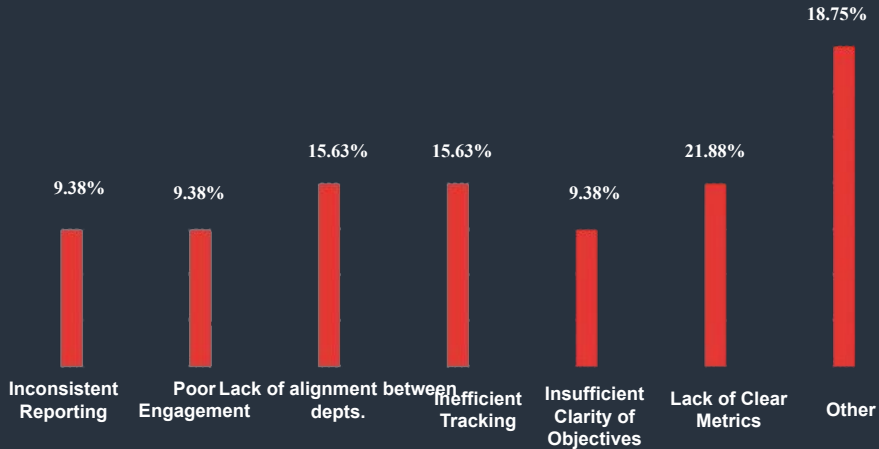
Easier collection methods. More support for departments to track and collect data. We were forced do dismantle our entire performance and data team this year and really struggle with keeping data and outcomes current. We also really struggle with technology and reporting tools to share data. Lastly, a better dashboard or tool that displays progress.

Employee Interview Information

Interviewee	Organization	Key Insights/Notes
<ul style="list-style-type: none"> Jenny Durda, Performance Director Jeff Bratcher, Organizational Performance Program Manager 	City of Glendale Glendale, Arizona	<ul style="list-style-type: none"> Resource for KPI's - ClearPoint list of KPI's When a KPI shelf life has expired, we ask ourselves what is the value in continuing to monitor it
<ul style="list-style-type: none"> Hazel Monae, City Manager's Office 	City of Gaithersburg Gaithersburg, Maryland	<ul style="list-style-type: none"> Strategic Outcome areas can be owned (Envisio) A barometer tracks internal updates within Envisio Process of providing updates within Envisio is intuitive and quick
<ul style="list-style-type: none"> Dave Gottesman, Assistant City Manager 	City of Rockville Rockville, Maryland	<ul style="list-style-type: none"> Envisio's platform is highly intuitive & their customer service orientation is service-minded Plans, Projects and Modules provide a full suite of services tailored to government City of Rockville Climate Action plan (Envisio) Plans that don't have implementation and accountability are just drapes

Yolo County Data Survey Results

Please check the reasons for challenges you've experienced measuring progress with the previous strategic plan.



What type of metrics would you like to see in the county-wide dashboard?



Do the metrics displayed on the current dashboard clearly align and measure progress toward specific objectives in Yolo County's strategic plan?

33%

Yes

67%

No

Please list the reasons for challenges you've experienced with the previous plan.

"Lack of bandwidth with current workload"

"I have only been with the County for two years"

"Lack of investment in software and needed staff"

"Lack of resources to collect data. Lack of tools to properly collect and display data. Lack of interest, follow-up and priority from decision-makers on strategic plan. No budget alignment to plan"

Key insights

- Need for improved metrics and alignment towards measuring strategic objectives
- Systematic issues with how data is collected, managed and reported
- Technological and Resource Limitations
- Lack of engagement



RECOMMENDED BEST PRACTICES

Our team's primary recommended best practices learned from other entities' strategic planning processes.

Addressing Yolo County's Challenges

Key Challenges in Strategic Plan Tracking

- 🚩 **Inconsistent Tracking:** Departments use different methods, leading to fragmented updates.
- 🚩 **Lack of Quantitative Metrics:** Many objectives lack measurable KPIs.
- 🚩 **Limited Engagement:** Staff and department heads struggle with ownership.
- 🚩 **No Unified Tracking Tool:** Data collection is manual, making updates time-consuming.

Best Practices to Overcome These Challenges

- ✅ **Structured and Standardized Reporting:** Clear progress labels and tracking guidelines.
- ✅ **Defined KPIs and Metrics:** Ensuring objectives are measurable and linked to county goals.
- ✅ **Centralized Dashboard Implementation:** Reducing inefficiencies and improving accessibility.
- ✅ **Regular Review Process & Staff Involvement:** Creating focus groups to drive accountability.

What This Means for Yolo County

By implementing these best practices, we create a clear, accountable, and data-driven framework for tracking Yolo County's 2024-2028 Strategic Plan.

Strengthening Strategic Outcomes: The Case for Focus Groups in Yolo County

1. Lack of Key Performance Indicators (KPIs)

- a. Internal interviews with both Operational Excellence and Flourishing Agriculture identified a clear need for KPI's to monitor the strategic plan

2. Data Integration and Accessibility Challenges

- a. Focus groups will help to identify data gaps and potential insights

3. Drive Stakeholder Engagement

- a. Engaging in structured discussions will ensure needs arise out of operational realities

4. Improve Communication and Accountability

- a. Areas that had been previously overlooked will be identified and brought to the forefront

Focus Groups



1. Define Strategic Objectives

- Ensure each objective is derived from the strategic plan
- Specificity and Measurability of Objectives

2. Assemble the Right Team

- Involve department heads to identify which parts of the strategic plan align with their departments roles and strengths
- Create focus groups of 5-8 members from departments that are relevant to each objective

3. Establish Clear Ground Rules

- Utilize a structured approach to discussions
- Vary discussions from strategic themes to specific and measurable outcomes

4. Developing KPIs

- Develop KPI's to direct link to each objective
- KPI's should be realistic and easily trackable over time
- What makes a good metric: Actionable, Common Interpretation, Accessible Credible Data, Transparent Calculation

5. Implementation and Evaluation

- Set up a clear timeline and methodology for implementing KPIs
- Schedule quarterly reviews to evaluate the effectiveness of KPIs

Focus Groups



6. Maintaining Relevance

- Set up a clear timeline and methodology for implementing KPIs
- Schedule quarterly reviews to evaluate the effectiveness of KPIs

7. Documentation and Communication

- Maintain transparency for reporting outcomes related to KPIs
- Treat KPI's as evolving based on feedback and changes in the county's environment

Lessons Learned from Glendale, Arizona

- “Throughout the process, there's continuous on-the-go learning in developing outcome-based KPI's”
- “While our previous plans were ambitious, they sometimes surpassed our actual tracking abilities”
- “Define Your Intended Results: What will Yolo County and it's employees BE if we meet these objectives”



Standardize the Strategic Plan Reporting Process



Initial Outreach by CAO

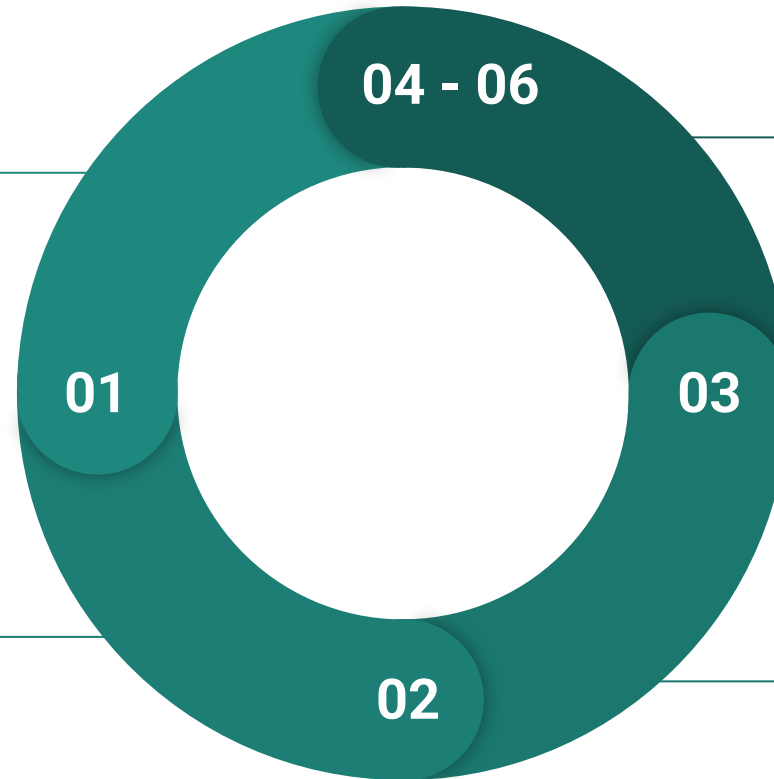
~2 MONTHS BEFORE BOS MEETING

The CAO notifies departments of the update cycle, provides templates and guidelines, and hosts a kickoff meeting to explain the process and expectations.

Department Response

4-6 WEEKS BEFORE BOS MEETING

Each department submits progress updates, using standardized status labels and providing narratives or qualitative explanations if data is unavailable. **Includes submitting revisions for actions within the Strategic Plan (if necessary).**



BOS Meeting and Public Update

The CAO presents the progress report to the BOS, gathers feedback, and updates the public dashboard to reflect the latest approved changes.

Aggregation and Analysis

2-3 WEEKS BEFORE BOS MEETING

The CAO compiles department updates into a central report, identifies progress trends and data gaps, and drafts key findings for the BOS.

Detailed reporting procedure and implementation plan provided in the final report.



Update Status Labels

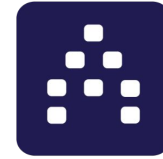
Ideal State: Ensure all strategies/actions have a measurable **baseline** and **target** metric to calculate exact percentage completion over time.

Recommendation: Divide the “In Progress” status label into quartiles to increase tracking precision.

- **Not Started** - Action has not begun yet, waiting to be delegated or resourced.
- ***Started (<25%)** - The objective is in early planning stages with minimal execution.
- ***In Progress (25% - 50%)** - Work has started and is actively being advanced.
- ***Moderate Progress (50% - 75%)** - More than halfway complete; significant work done but major steps remain.
- ***Significant Progress (>75%)** - The objective is mostly completed, but some final steps remain.
- **Pending** - Near completion, awaiting final motion (e.g., final signature, approval, or review).
- **Completed** - Fully finished action steps and deliverables.
- **Ongoing** - A continuous, perpetual cycle of maintenance work.
- **Delayed** - Temporarily halted from progress, postponed until further notice.

Percent completion quartiles:

- ❖ Provide structured tracking with flexibility for more qualitative actions (policy work, community outreach).
- ❖ Allow the County to monitor the movement of objectives between quartiles, providing a clearer sense of momentum or stagnation.



DASHBOARD OPTIONS

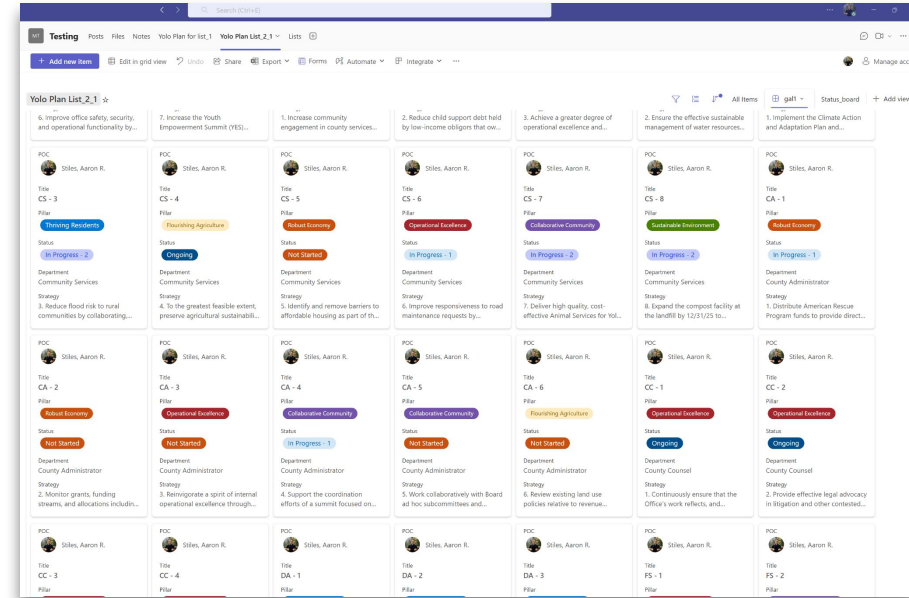
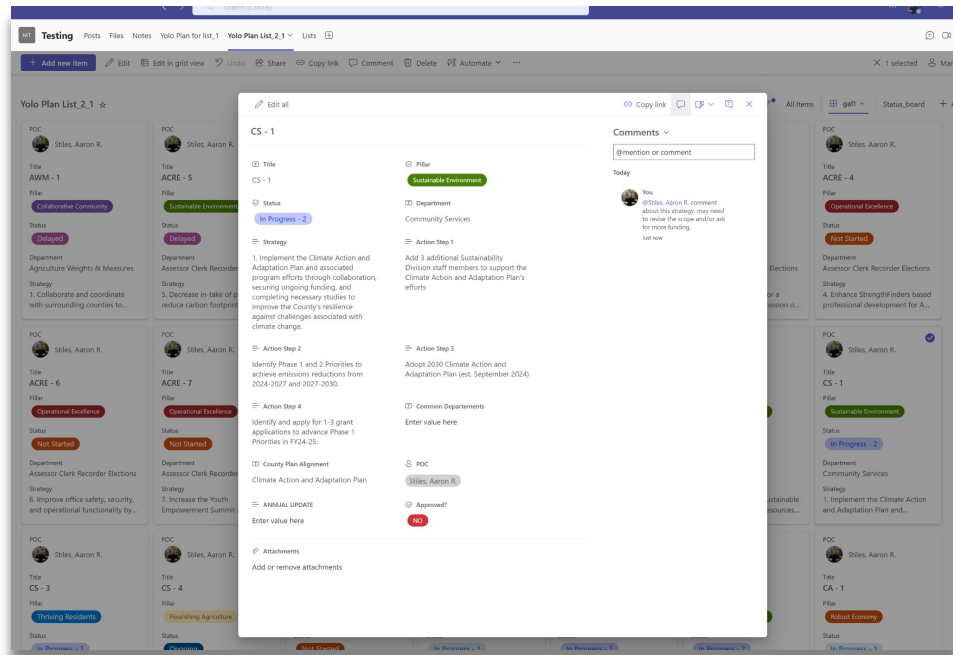
Evaluation of available software applications for tracking Yolo County's Strategic Plan.

Microsoft Lists (via Teams or Sharepoint)



Microsoft Lists is a flexible, customizable tool within Microsoft 365 that allows teams to track information, manage workflows, and collaborate on data in a structured, easy-to-use format.

It can be created directly from Microsoft Teams or in SharePoint by adding a "Lists" tab to a team channel.



Centralized Tracking: A single, cloud-based platform where all departments can update progress simultaneously.

Customizable Fields: Each strategy can have customized fields for status, deadlines, responsible departments, collaborators, and notes.

Microsoft Lists (via Teams or Sharepoint)



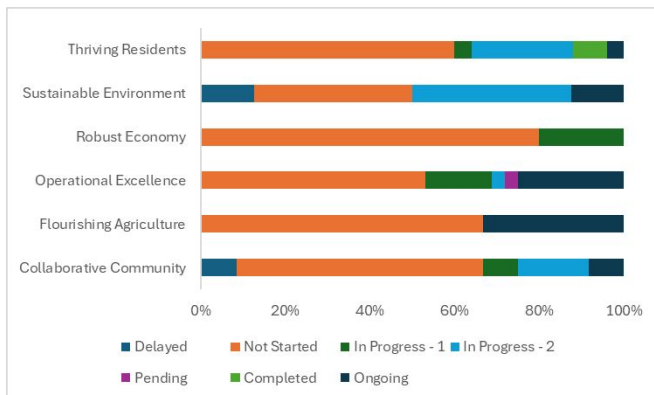
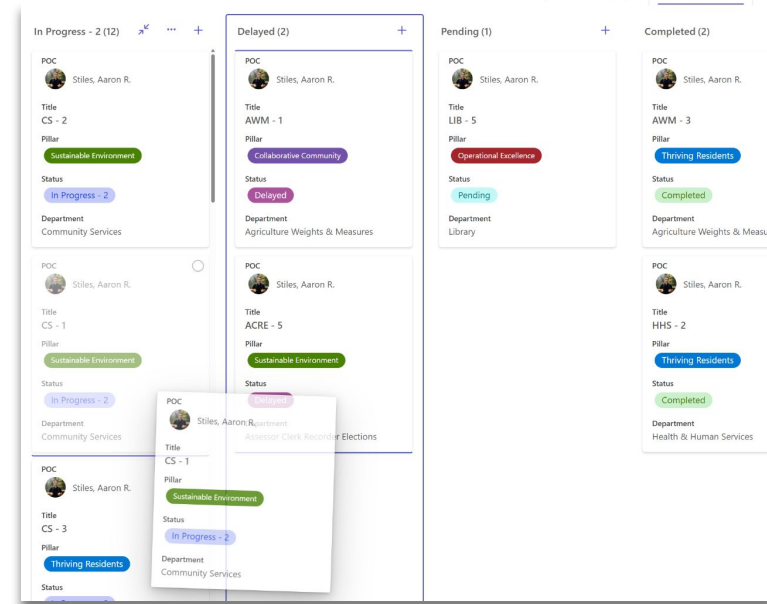
Why MS Lists is fit for Yolo County:

Included in Microsoft 365: No additional licensing cost for Microsoft Lists. Advanced automation (via Power Automate) or creating sophisticated dashboards (via Power BI Pro) may incur additional costs.

Minimal Learning Curve: Lists is intuitive for staff familiar with Excel, SharePoint, and Teams.

MS Lists Limitations:

Not Purpose-Built for Strategic Planning: Lists lacks the out-of-the-box strategic planning features that some specialized tools provide. Creating a public-facing display may require using another system.



Title	Pillar	Status	Department	Strategy	POC
AWM - 1	Collaborative Community	Delayed	Agriculture Weights & Measures	1. Collaborate and coordinate with surrounding counties to establish a new K-9 Unit for Pest Detection Program and support pest prevention activities.	Stiles, Aaron R.
ACRE - 5	Sustainable Environment	Delayed	Assessor Clerk Recorder Elections	5. Decrease in-take of paper and reduce carbon footprint by expanding electronic recording (e-recording) to 90% of all recordings.	Stiles, Aaron R.
AWM - 2	Sustainable Environment	Not Started	Agriculture Weights & Measures	2. Establish Electric Vehicle Charging Station Supply Equipment (EVSE) Inspection Program to protect customers.	Stiles, Aaron R.



Monday Work Management

Initiative Tracking Software

- Internal Tracking software that allows for multiple views (Kanban, List, etc)
- Functions similar to SharePoint Excel where input/output can be monitored in real time

Performance Tracking

- Indicates if initiative is on pause and needs further guidance from additional departments
- Budget allocation tracking:
 - Can assign dollar amount to specific strategy for greater tracking efficiency
- Capability for definition of metrics

Visualization

- Provides “Big Picture” overview
- Segmentation of categories flexible but simple to navigate

The screenshot displays a Monday.com Kanban board for a project titled "Thriving Residents". The board is organized into four columns: "Done 5", "Working on it 7", "Stuck 2", and "Not Started 5". Each card represents a task with details such as status, priority, due date, and budget. For example, in the "Done" column, a task "Determine existing agricultural issues..." is marked as "Done" with a due date of May 16 and a budget of 42,000. In the "Working on it" column, a task "Create educational material..." is marked as "Working on it" with a due date of Feb 6, 2026 and a budget of 72,000. The "Stuck" column contains two tasks, both marked as "Stuck" with due dates of Jul 29, 2027 and budgets of 12,000. The "Not Started" column contains three tasks, all marked as "Not Started". The interface includes a left sidebar with navigation options like "Home", "My work", and "Workspaces", and a right sidebar for "Widget settings".

Comparing Monday

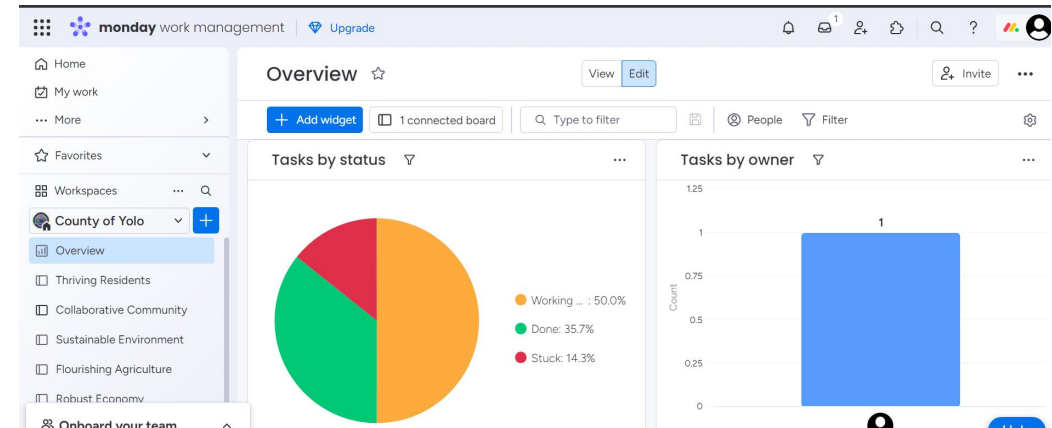


Benefits for Yolo County

- Simplified interface for easy access to data.
- Easy integration with follow-up and delegation practices
 - File upload feature
- Analytics for process-improvement using AI
- Definition of metrics for flexibility in tracking
- Timeline Tracking for long-term strategic plan
- Constantly updating applications for improvement

Limitations

- Security concerns around being a web-based software
- Limited integration with public dashboard information



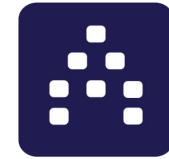
The screenshot shows the 'Widgets Center' in Monday.com. It features a search bar and a list of categories on the left: Staying on Top, Motivation, Media, Personal, Apps by monday, and Marketplace apps (which is selected). The main area displays 'Marketplace apps' with two featured options:

- Automated Custom Reports**: Advanced analytics for unlimited monday.com boards.
- 1View**: Make your Dream View in monday to manage, update and track everything at one single place.

On the right side, there are several widget options:

- Chart**: Create chart widget to visually show data from your boards.
- Numbers**: Get a quick view on all number columns (example: \$378k).
- Battery**: Your progress at a glance.
- Gantt**: Plan, track and present your projects visually using the Gantt chart.
- Files Gallery**: Manage and collaborate on your files with...

Cascade



- **Centralized Planning:** Comprehensive strategy execution platform with metrics, and reporting to ensure consistency and alignment.

- **Data Integration:** Real-time data, visualize relationships between departments, and overall visual of strategic goals

Corporate Plan

Mission Statement

Owners and collaborators: Leadership Team

Assigned team: Leadership Team

Planner | Timeline

Strategic Pillar

- Accelerate Revenue Growth** (Strategic pillar) - Current, Behind
- Expand market penetration to increase revenue in all regions** (Corporate objective) - Year 2027 (Jan 01, 2024 - Dec 31, 2027) - 71% - Behind
- Broaden revenue sources through product innovation and new channels** (Corporate objective) - Year 2027 (Jan 01, 2024 - Dec 31, 2027) - LB 65% - Behind
- Customize product offerings to align with regional market needs** (Corporate objective) - Year 2027 (Jan 01, 2024 - Dec 31, 2027) - LB 68% - On Track
- Enhance Profitability and Cash Flow** (Strategic pillar) - Current, At Risk
- Lower COGS across all regions to optimize operations** (Corporate objective) - Year 2027 (Jan 01, 2024 - Dec 31, 2027) - 50% - At Risk
- Improve resource allocation to drive sustainable growth** (Corporate objective) - Year 2027 (Jan 01, 2024 - Dec 31, 2027) - 61% - Behind
- Enhance profitability through M&As** (Corporate objective) - Year 2027 (Jan 01, 2024 - Dec 31, 2027) - 53% - At Risk
- Innovation and Technology Leadership** (Strategic pillar) - Current, On Track

Regional objective

Leverage data-driven insights for customer-centric innovations

2024-2025
Jan 01, 2024 - Dec 31, 2025 (10 months to go)

71% of 100%

100
80
60
40
20
0

Jan '24 May '24 Sep '24 2025 Apr '25 Aug

Details | Success criteria | Updates | Risks | Relationships

Add description

Update schedule: No schedule currently set

Owner: Jack Alexander (estefania.alonso+12a@cascadia.app)

Collaborators: Add collaborators

Budget: Allocated \$ \$12,000

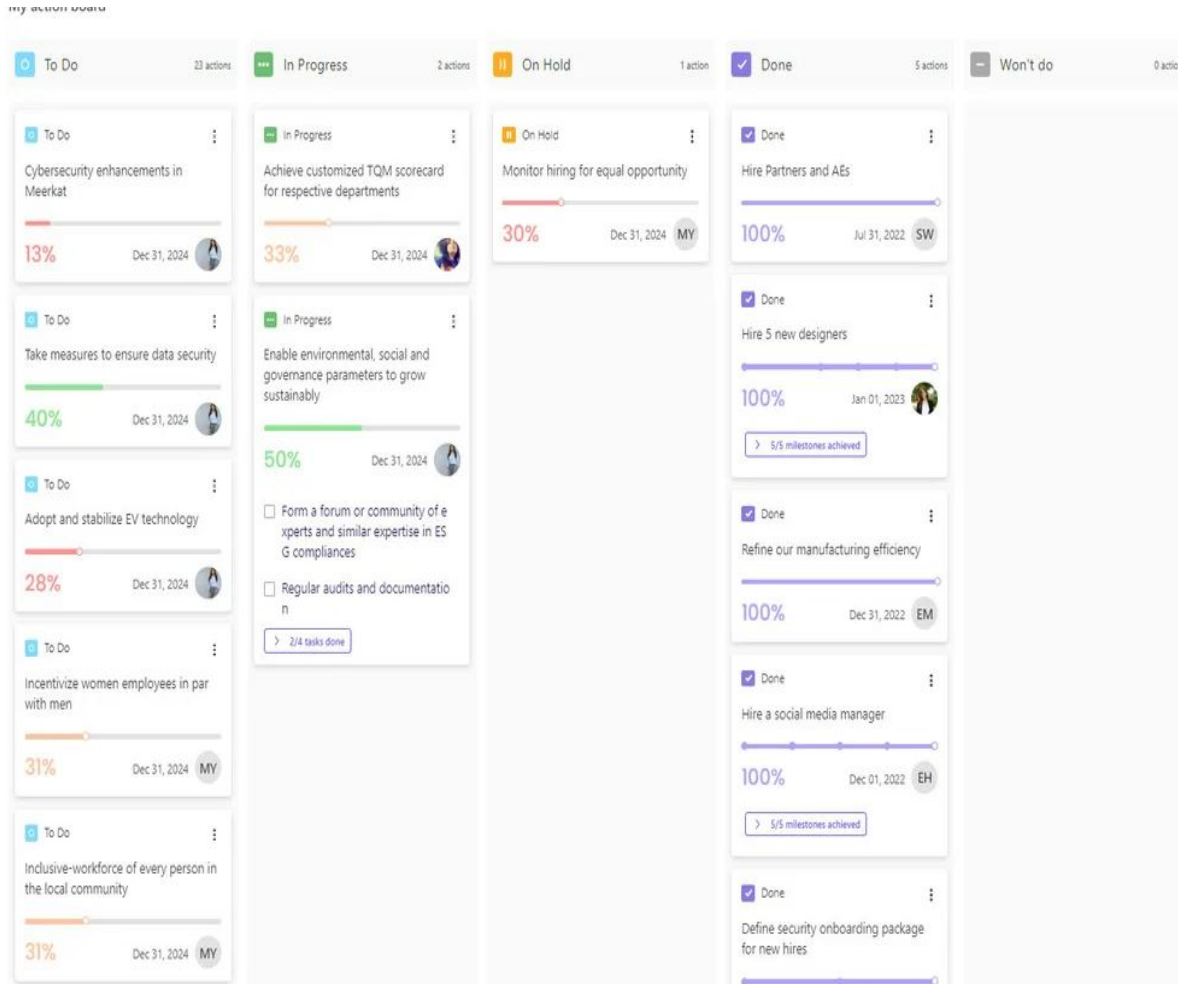
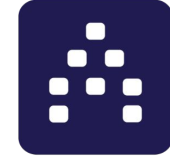
Contributes to: APAC Plan, Regional plan, Innovation and Technology Leadership

Other: Enhance customer experience through technology (Corporate Plan)

Comments: Leave a comment

- Lower COGS across all regions to optimize operations (Corporate objective)
- Improve resource allocation to drive sustainable growth (Corporate objective)
- Enhance profitability through M&As (Corporate objective)
- Innovation and Technology Leadership** (Strategic pillar)
 - Enhance customer experience through technology (Corporate objective)
 - Leverage data-driven insights for customer-centric innovations** (Regional objective) - APAC Plan
 - Adopt technology to enhance customer interactions (Regional objective) - EMEA Plan
 - Innovate in product development and customer experience (Regional objective) - NAMER Plan
 - Drive digital transformation for optimization and growth (Corporate objective)
 - Leverage technology to boost product innovation (Corporate objective)
 - Drive High-Performance Culture** (Strategic pillar)
 - Advance ESG initiatives for sustainable growth (Corporate objective)
 - Promote stakeholder transparency to build trust (Corporate objective)

Kanban and Personalized Summary Report (Cascade)



- **Kanban Board for Task Management** – Track project progress with status updates (To Do, In Progress, On Hold, Done).

Why Cascade is Fit for Yolo County:

- **Progress Tracking with Milestones** – Supports percentage-based completion tracking
- **Designed for Strategic Planning:** Purpose-built for tracking long-term initiatives, aligning with Yolo County's Six Pillars.
- **Customizable Dashboards** – Allows departments to visualize key metrics, milestones, and progress percentages.
- **Automation & Integration** – Supports automated reporting, data updates, and integration with other platforms

Cascade Limitations:

- **Learning Curve:** Requires additional training to fully utilize its advanced features
- **Cost Considerations:** Advanced features and integrations may require additional investment.
- **Public-Facing Complexity:** While great for internal use, additional setup may be needed for an accessible public dashboard

Envisio

Envisio is a strategic planning and performance management software designed primarily for government agencies, nonprofits, and educational institutions. It helps organizations set, track, and report on strategic goals while aligning departmental actions with overarching plans.

Initiative Tracking Software

- Link initiatives to strategic goals and KPI's
- Real-time progress tracking
- Cross-departmental collaboration
- Integration with government systems
- Benchmarking and trend analysis

Performance Tracking

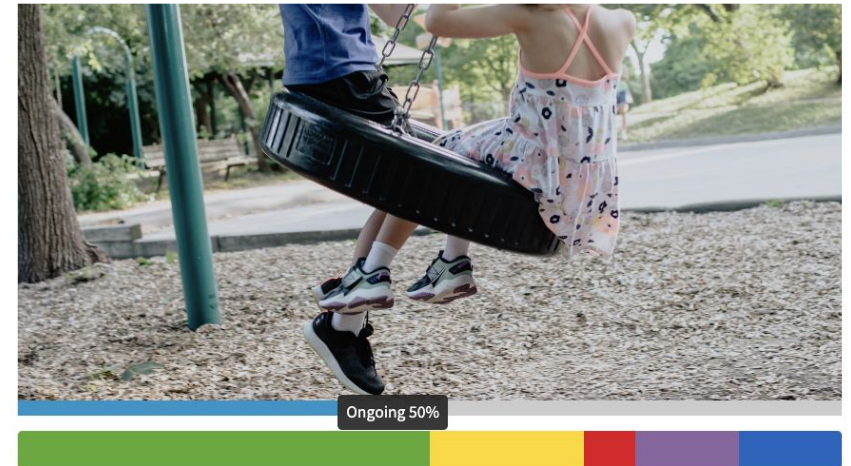
- Customizable performance reports
- Public accountability and transparency
- Custom dashboards and reports

Visualization

- Drill-down functionality
- Milestone tracking
- Graphical data representation



- [County of Yolo Strategic Plan Progress Report](#)
- [At Risk Report](#)
- [County of Yolo Strategic Plan Dashboard](#)



THRIVING RESIDENTS

To provide a healthy, safe, and inclusive place to live, work, and visit.

Envisio (Plans Module)



Plans Mayor & Council Initiatives Act Impersonating Andrew Lett. All changes will be recorded under this user. Need Help?

Submit Updates Search

Andrew Lett: All 5 All Plan Levels 5 Overdue 1 Pending Updates 0

Strategic Initiative 2 Reporting dates missing

- Strategic Initiative 2.2 Progress 0% Increase childcare program opportunities for city residents and employees
DG AG AL CH ED KS +2
- Strategic Initiative 4.4 Progress 22.14% Develop a King Farm Farmstead master plan
DG AG AL CH ED KS +2

Action Item 3 Reporting dates missing

- Action Item 2.2.1.2 Progress 0% Compile information on current childcare programs offered by the Department of Recreation and Parks
AL PJ Jan 6, 2025
- Action Item 2.2.1.5 Develop budget recommendations to implement childcare programs/services
TS AL CH PJ Oct 1, 2025
- Action Item 4.4.1.4 Progress 55% Develop Engage Rockville Site for King Farm Farmstead Park Project
Mar 3, 2025: Accomplishments
TS AL ED Aug 1, 2025

Guiding Principle 4 / Strategic Initiative 4.4 / Department Workplan 4.4.1 / Action Item 4.4.1.4 Progress 55%

Description Develop Engage Rockville Site for King Farm Farmstead Park Project

Start Date End Date
Dec 20, 2024 Aug 1, 2025

Outcome 6

Updates 1

New Update* Update Date Mar 5, 2025

AI Assist B I U List Bulleted Link Copy from

TEST

Status On Track

Progress On Track 55%

Submit Update On Hold

AL Andrew Lett Delayed Progress 55%

Accomplish Completed

Roadblocks Discontinued

Next Steps: Promote the publication to relevant stakeholders and audiences to maximize its impact and reach.

Show More...

Custom Fields 3

Shared Notes 0

Envisio Resources X

Setting you on the path to success

search our help center

- Help Center**
Review knowledge articles and best practice content, or request help
- Envisio Academy**
Register for live training classes
- Contact Support**
Submit a support case to our team
- Envisio Blog**
News, research, and insights into strategy and performance management
- What's New? (release notes)**
- Watch the new Navigation and Home Page video tour**

Why Envisio?



1. Lack of Clear Alignment Between Metrics and Strategic Plan

- Envisio is specifically designed for managing and tracking strategic plans
- Automates data tracking and reporting

2. Difficulty in Tracking and Reporting Metrics

- Departments can enter data manually or have automated reporting with real-time updates

3. Lack of Bandwidth to Track Data Effectively

- Reduces administrative burden with automated performance tracking
- Can track quantitative, qualitative and milestone based metrics

4. Inconsistent Reporting and Data Gaps

- Facilitates cross-departmental data integration

5. Lack of Public Engagement

- Provides engaging visually intuitive dashboards that are easier for the public to access and understand.

Dashboard Tool Comparison



Criteria	Microsoft Lists	Monday	Cascade	Envisio
KPI Tracking and Reporting	Manual input	Manual Input	Automated Input	Automated tracking
Ease of Use	Intuitive for users familiar with MS Teams/SharePoint.	Excel-Style Spreadsheet	Intuitive interface, would require initial training though	Designed for government use
Public Transparency	Cannot share MS lists with the public directly.	Customizable Charts and Graphs for Public Display	Customizable dashboards, not public facing without additional setup	Built-in public dashboards
Cost	Included with Microsoft 365	Standard Pricing :\$14 per user	Standard price: \$59 per user per month	Starts at \$20,000/year
Dashboard & Visualization Capabilities	Gallery or Spreadsheet views. No direct data visualization without other MS tools.	Interchangeable Lists, Graphs, User Assignments, Budget Display, AI Integration, and Supporting Applications	Dashboard Planner, Kanban boards, progress tracking	Custom dashboards, charts, graphs and data analysis, public facing dashboards, mobile friendly
Data Integration	Microsoft ecosystem	LinkedIn, Microsoft 365, Google Applications, Jira, Dropbox, etc	Connects with external tools and data sources for tracking KPIs	Integrates with financial, HR and reporting systems
User Accessibility and Training	Cloud-based system. No formal training, but informal “how-to’s” available on the web (e.g., youtube).	Web-Based Software with Live Input	Free guided demos, and training guides on website	Guided implementation and structured onboarding

Dashboard Recommendation

Recommended Tool: **Envisio**

- ✓ **Government-Specific Solution** – Designed for strategic planning and performance tracking.
- ✓ **Automated Reporting & AI Assistance** – Reduces manual effort and improves data accuracy.
- ✓ **Public Transparency Features** – Customizable public dashboards.
- ✓ **Scalability for Future Growth** – Supports long-term strategic tracking needs.

Implementation Considerations:

-  **Budget Requirement:** Envisio is a premium solution requiring dedicated funding.
-  **Training & Setup:** Departments will need onboarding and process alignment.

Alternative: **Microsoft Lists**

- ✓ **Low-Cost Option** – Included with Microsoft 365. Avoids additional fees if budget is a constraint.
- ✓ **Simple, Familiar Interface** – Easy adoption for staff familiar with Excel, SharePoint, and Teams.
- ✓ **Customizable Tracking Fields** – Allows for tailored status labels and strategic objectives.

Next Steps for Yolo County: **Four Phase Implementation Plan**

Phase 1: Finalize Best Practices & Tool Selection

- ◆ **Present Final Recommendations** – Share findings with Yolo County leadership and stakeholders.
- ◆ **Confirm Best Practices & Reporting Structure** – Align on status labels, KPI requirements, and data collection methods.
- ◆ **Select Tracking Tool** – Finalize decision on **Envisio**, **MS Lists** (or alternative).

Phase 2: System Setup & Process Development

- ◆ **Configure Dashboard & Integrations** – Work with IT to implement the selected tool.
- ◆ **Conduct Training for Department Heads & Staff** – Ensure all teams understand new tracking processes.

Phase 3: Pilot & Initial Data Collection

- ◆ **Launch Pilot Program** – Implement new tracking system with a select group of departments.
- ◆ **Collect Initial Data & Refine Processes** – Identify gaps, adjust workflows, and gather feedback.

Phase 4: Full Implementation

- ◆ **Expand Full System Rollout** – Apply refined processes across all departments.
- ◆ **Implement Annual Review Cycles** – First **formal Strategic Plan update** scheduled for early 2026.

Questions?

APPENDIX

Interview Questions (Internal)

Q1: How many people are directly involved in reporting? I. Who backchecks this information? II. How many people are involved?

Q2: What data are you unable to attain from other entities (state and federal)? I. Would you like more support with tracking and collecting data?

Q3: How reliant is your department on external data to fulfill the strategic plan requirements? What tools or systems do you use to collect the data?

Q4: Are you aware of the current dashboard and if so, do you have any concerns?

Q5: Do you believe that your department streamlines initiatives effectively?

Q6: What metrics do you use to track the pillar(s)?

- What are the most critical metrics to measure success across these pillar(s)?
- How do these metrics help in tracking progress?
- Are there any additional metrics that you believe should be captured to provide a more comprehensive view of the process?
- Are there gaps in your data collection?

Q7: What is your preferred metric reporting cadence?

- What additional support would help your department better align and support the strategic pillars?

Q8: What future projects or initiatives are planned that will further support the strategic pillars

Q9: Did you respond to the survey sent out through Cindy?

Q10: What were your thoughts in responding to the survey? (Any you could not answer?)

Interview Questions (External)

Q1: How many people are directly involved in reporting? I. Who backchecks this information? II. How many people are involved?

Q2: Would you provide an overview of your strategic plan and its objectives?

Q3: What led to the development of your current dashboard? I. What are the key features and functionalities?

Q4: What systems or tools do you use to collect the data?

Q5: What challenges have you encountered with configuring this dashboard?

Q6: What lessons have you learned from strategic planning and dashboard implementation?

Yolo County Survey Questions

Q1: What metrics is your department currently tracking?

Q2: Do the metrics displayed on the current dashboard clearly align and measure progress toward specific objectives under each pillar in Yolo County's Strategic Plan?

Q3: How frequently do you access the current dashboard to monitor metrics?

Q4: Please check the reason(s) for challenges you've experienced measuring progress with the previous strategic plan. Click all that apply.

Q5: What type of metrics would you like to include in the county-wide dashboard?

Q6: Do you have access to all the data needed to track your department's progress against its strategic objectives?

Q7: Are there any county metrics dashboards that you find visually appealing or particularly functional? If yes, please specify

[Link to Yolo County Survey Results](#)