

FINAL WORKING PAPERS

Yolo County Strategic Plan Dashboard Development

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Standardizing the Reporting Process

Why is a standardized reporting procedure important?

Having a standardized reporting procedure with a specific timeline is important because it ensures consistency, accountability, and transparency across all departments, allowing the County to track progress in a reliable and comparable way. A clear process helps departments plan ahead, ensuring updates are submitted on time and aligned with budget cycles, Board reviews, and public reporting. It also provides the Board of Supervisors and the public with regular, predictable updates, enhancing trust and supporting data-driven decision-making. Finally, a structured process reduces confusion by setting clear expectations for what information is needed, how it should be presented, and when it must be provided, making updates easier for staff to complete and for leadership to evaluate.

Implementation Plan

- 1. Set the Annual Calendar**

Start by aligning the strategic plan update cycle with existing processes like the budget review and annual department head workshops. This ensures updates become part of the normal workflow, rather than an isolated task. Publish a yearly timeline at the start of each fiscal year so departments know exactly when updates are due and when reviews will occur.
- 2. Create and Distribute Standard Templates**

Develop a simple, standardized template with the county's preferred tool (e.g., SharePoint, Envisio, etc.) that all departments use for reporting progress.
- 3. Designate Department POCs for Strategic Plan Updates**

Ask each department to identify a primary point of contact responsible for gathering and submitting their updates (may include department heads or lower-level staff). This liaison works directly with the CAO's office and attends the kickoff and training sessions to understand expectations.
- 4. Host a Kickoff and Training Session**

Before each reporting cycle, hold a kickoff meeting to walk through the process, explain the timeline, demonstrate how to fill out the template, and answer questions. This ensures clarity upfront and reduces back-and-forth later.
- 5. Perform Tracking and Updates per the Procedure**

Utilize the procedure to perform strategic plan tracking and updating for each of the departments and all strategies/actions.
- 6. Review and Improve Process**

After the first full cycle, hold a short debrief session with department liaisons and CAO staff to gather feedback and adjust the process for the next round.

5C's Framework

The 5C Analysis is a strategic framework used to evaluate key factors that influence an organization's success. It provides a structured approach for analyzing both internal and external factors that impact decision-making and long-term strategy (Corporate Finance Institute, n.d.). The framework consists of five components: Company, Customers, Competitors, Collaborators, and Context, each playing a crucial role in shaping an organization's operations and strategic direction.

Company

The Company component assesses an organization's internal strengths, mission, and operational structure. This includes evaluating financial health, competitive advantages, and core competencies. Businesses use this analysis to determine their market positioning and areas for improvement, while government entities use it to assess service priorities and operational efficiencies. By understanding its internal capabilities, an organization can better align resources with strategic objectives (Corporate Finance Institute, n.d.).

Customers

The Customers component examines the target audience, consumer behavior, and overall market demand. Businesses analyze market segmentation, customer needs, and loyalty to optimize products and services. In the public sector, customers include internal employees, external stakeholders, and the general public. Understanding customer expectations allows organizations to refine service offerings, enhance public engagement, and ensure that strategic initiatives align with community needs (Corporate Finance Institute, n.d.).

Competitors

The Competitors component focuses on identifying and analyzing direct and indirect

competitors in the market. This includes evaluating market share, pricing strategies, and key differentiators. In competitive industries, businesses use this analysis to develop strategies that enhance their market position. While government agencies do not compete in traditional markets, they often benchmark their performance against other municipalities to improve efficiency and adopt best practices (Corporate Finance Institute, n.d.).

Collaborators

The Collaborators component includes key partnerships, suppliers, and other external stakeholders that contribute to an organization's success. Businesses rely on strategic alliances and supply chain partnerships to enhance operations, while government agencies collaborate with non-profits, community organizations, and other government bodies to deliver services effectively. Strong collaboration can improve resource allocation, funding opportunities, and service impact (Corporate Finance Institute, n.d.).

Context

The Context component considers external factors that may impact an organization's operations, including economic trends, technological advancements, regulatory requirements, and social changes. Businesses monitor these external influences to anticipate industry shifts and mitigate risks. In the public sector, government agencies must consider policy changes, compliance with regulations, and evolving community needs to ensure effective governance and service delivery (Corporate Finance Institute, n.d.).

Yolo County Strategic Plan Update Procedure

Example

Purpose and Scope

The purpose of this procedure is to establish a clear, consistent process for collecting, evaluating, and reporting updates on the progress of Yolo County's Strategic Plan objectives. It ensures that all departments provide timely, accurate, and meaningful updates, using both quantitative data when available and qualitative narratives when data is limited. This procedure applies to all County departments and covers the full lifecycle of strategic plan updates—from initial outreach to public reporting. By standardizing these steps, the County enhances transparency, improves data quality, and supports informed decision-making by the Board of Supervisors and the public.

Procedure

1) Initial Outreach by the County Administrator's Office (CAO)

Timeline: ~2 months before Board of Supervisors (BOS) review

- a) Prepare Notification:
 - i) The CAO drafts an official memo to department heads, notifying them of the upcoming strategic plan update cycle.
 - ii) The memo includes:
 - (1) Deadline for submitting updates
 - (2) Instructions for providing updates (e.g., template, third-party software, or SharePoint submission)
 - (3) List of existing strategic plan objectives assigned to each department
 - (4) Guidelines on progress labels (e.g., "Not Started," "In Progress," "Delayed," "Completed")
 - (5) Request for supporting data (qualitative or quantitative metrics, narrative descriptions)
- b) Schedule a Kickoff Meeting:
 - i) Organize a virtual or in-person meeting with department heads and senior staff to:
 - ii) Clarify the process and expectations
 - iii) Address any concerns about reporting requirements
 - iv) Address how to process a revision (**Step 7**)

2) Data Collection from Department Heads

Timeline: 4-6 weeks before BOS review

- a) Department Heads Provide the Following Information:
 - i) Status Updates for Each Strategic Action Step:
 - (1) Use progress completion labels:

- (a) Not Started – No action taken
 - (b) In Progress – Work has begun but is not yet complete
 - (c) Delayed – Work was planned but has been postponed (with an explanation)
 - (d) Completed – The objective has been fully achieved
 - (e) Ongoing – Continuous work is required (e.g., public services, infrastructure maintenance)
- ii) If status is "Delayed", provide a justification and a new estimated completion date
- b) Narrative Summary (1-2 paragraphs per objective)
 - (1) Describe any key achievements related to the strategic action
 - (2) Highlight any challenges or barriers encountered
 - (3) Identify additional resources or adjustments needed for successful completion
 - c) Quantitative and Qualitative Data (If Available)
 - i) Performance metrics (e.g., “20% increase in affordable housing units” or “15 new community outreach events conducted”)
 - ii) Stakeholder feedback or community engagement results
 - d) If a revision is necessary, see instructions in **Step 7**.

3) Aggregation and Analysis by the CAO

Timeline: 2-3 weeks before BOS review

- a) Aggregate Data into a Centralized System
 - i) The CAO compiles all departmental updates into a structured tracking document (SharePoint, Excel, Power BI, or third-party software)
- b) Analyze Trends & Identify Key Findings
 - i) Summarize overall progress across departments and/or strategic pillars
 - ii) Identify high-priority objectives that require board intervention (e.g., stalled or delayed projects)
 - iii) Highlight notable achievements and challenges
 - iv) Cross-check updates against previous reports to assess long-term trends
- c) Prepare Draft Key Issues Report
 - i) List major takeaways for the BOS presentation
 - ii) Note any budget implications or policy changes needed
 - iii) Prepare a summary of departmental requests for additional resources

4) Preparation for the Board of Supervisors Meeting

Timeline: 1 week before BOS review

- a) Prepare a Formal Strategic Plan Progress Report
 - i) Include:
 - (1) Executive Summary with a high-level overview of progress

- (2) Detailed breakdown by strategic pillar
 - (3) Charts and visuals to show trends over time
 - (4) Highlight of completed and delayed projects
 - (5) Key challenges and proposed solutions
- b) Develop BOS Presentation Slides
 - i) Use PowerPoint or a dashboard format with the following structure:
 - (1) Overview of strategic plan progress
 - (2) Data-driven insights with key metrics
 - (3) Departmental achievements and challenges
 - (4) Recommended adjustments to action steps
 - (5) Next steps and mid-year review plan
 - c) Distribute Reports to Supervisors and Key Staff
 - i) Provide BOS members and department heads with the final report a few days before the meeting

5) Present to the Board of Supervisors

Timeline: BOS Meeting

- a) CAO Presentation & Discussion
 - i) Present key findings and insights
 - ii) Highlight department efforts and successes
 - iii) Address major delays and propose solutions
 - iv) Take feedback from the BOS
- b) BOS Decision & Next Steps
 - i) The BOS may request additional information, policy changes, or resource adjustments
 - ii) Any approved changes will be incorporated into the plan update

6) Updating the Online Dashboard

Timeline: Within 1-2 weeks after BOS approval

- a) CAO (or designated staff) Updates Public Dashboard
 - i) Reflect new progress updates
 - ii) Incorporate newly approved action steps
 - iii) Remove or revise obsolete goals
 - iv) Ensure updates align with public transparency goals
- b) Coordinate with Public Information Officer (PIO)
 - i) Update the county's strategic plan webpage with highlights
 - ii) Share updates on social media and newsletters

7) Processing & Approving Revisions to the Strategic Plan

- a) Identifying a revision to the Strategic Plan strategies or actions.
 - i) If a Department identifies the need to change, add, or remove an action step, they must:
 - (1) Provide a written justification for the proposed change
 - (2) Indicate whether the change is **Minor** or **Major**:
 - (a) **Minor revisions** are adjustments that do not significantly alter the intent, scope, or resource requirements of a strategic action step. These changes generally involve operational adjustments that can be approved administratively by the CAO. Examples include:
 - (i) Extending a project deadline due to scheduling conflicts or minor delays.
 - (ii) Clarifying the wording of an objective for improved understanding without changing its core purpose.
 - (iii) Adjusting timelines or milestones based on shifts in staffing capacity or minor external factors.
 - (iv) Updating metrics to improve tracking, provided the fundamental outcome being measured remains the same.
 - (b) **Major revisions** involve substantive changes that significantly shift the intent, funding requirements, or policy implications of a strategic action step. These revisions require review and approval by the Board of Supervisors. Examples include:
 - (i) Adding a completely new strategic action step or removing an existing one.
 - (ii) Changing the core goal, desired outcome, or overall purpose of a project or initiative.
 - (iii) Reallocating significant financial resources or requesting new funding to support the revision.
 - (iv) Adding or removing a department's responsibility for a particular action step due to changes in program scope.
 - (v) Introducing new policy directives that impact how the objective is pursued.
- b) CAO Review Process
 - i) The CAO's Office evaluates the proposed revision, considering:
 - (1) Impact on overall county priorities
 - (2) Alignment with budget constraints
 - (3) Potential overlap with existing initiatives
- c) Approval Process
 - i) **Minor revisions** → **Approved directly by the CAO**
 - ii) **Major revisions** → **Require BOS approval**
- d) Incorporating Approved Revisions
 - i) Approved revisions are included in the next strategic plan update cycle
 - ii) The public dashboard is revised accordingly

Status Label Update

| Status | Description |
|-----------------------------|--|
| Not Started | Action has not begun yet, waiting to be delegated or resourced. |
| Started | The objective is in early planning stages with minimal execution (less than 25%) |
| In Progress | Work has started and is actively being advanced (25% - 50%) |
| Moderate Progress | More than halfway complete; significant work done but major steps remain. (50% - 75%) |
| Significant Progress | The objective is mostly completed, but some final steps remain. (above 75%) |
| 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. |

Benefits of Expanding Yolo County’s Status Labels to Quartiles

Expanding the status labels to quartiles enhances granularity, precision, and accountability in tracking the progress of Yolo County’s Strategic Plan objectives. The benefits include:

1. Improved Accuracy & Clarity

- Breaking down “In Progress” into finer increments provides a clearer picture of movement toward completion.
- Departments can more effectively track and communicate incremental progress.

2. Better Decision-Making

- Quartile tracking allows leadership to identify bottlenecks early and intervene where needed.
- Helps with resource allocation by focusing on projects that are lagging.

3. Enhanced Transparency & Public Engagement

- Allows the public to see detailed progress instead of broad labels, improving trust in governance.
- Provides a more intuitive dashboard for external and internal stakeholders.

4. More Effective Performance Management

- Encourages consistent updates by showing tangible progress.
- Provides a benchmarking mechanism for departments to compare progress.

One caveat: you may not need to roll all the status labels out to the public side. This can be kept internally to reduce the complexity of what the public is presented.

Focus Groups

[Glendale, Arizona Focus Groups Deck](#)

- 1. Define Strategic Objectives**
 - a. Ensure each objective is derived from the strategic plan
 - b. Specificity and Measurability of Objectives

- 2. Assemble the Right Team**
 - a. Involve department heads to identify which parts of the strategic plan align with their departments roles and strengths
 - b. Create focus groups of 5-8 members from departments that are relevant to each objective

- 3. Establish Clear Ground Rules**
 - a. Utilize a structured approach to discussions
 - b. Vary discussions from strategic themes to specific and measurable outcomes

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

- 5. Implementation and Evaluation**
 - a. Set up a clear timeline and methodology for implementing KPIs
 - b. Schedule quarterly reviews to evaluate the effectiveness of KPIs

- 6. Maintaining Relevance**
 - a. Set up a clear timeline and methodology for implementing KPIs
 - b. Schedule quarterly reviews to evaluate the effectiveness of KPIs

- 7. Documentation and Communication**
 - a. Maintain transparency for reporting outcomes related to KPIs
 - b. Treat KPI's as evolving based on feedback and changes in the county's environment

Objective Teams_Focus Group Construct Glendale, Arizona

| Order | OBJECTIVE | Team Members | DEPARTMENT | ROLE | Meeting Dates |
|-------|--------------------------------|-------------------|---------------------------|-------------------------|---------------|
| 1 | 1 Improve Community Experience | Brent Stoddard | City Manager's Office | City Management | 4/24/2024 |
| 2 | 1 Improve Community Experience | John Kennedy | Parks and Recreation | Executive Sponsor | 5/8/2024 |
| 3 | 1 Improve Community Experience | Jean Moreno | Community Services | Executive Sponsor | |
| 4 | 1 Improve Community Experience | Jenny Durda | Org Performance | Org Performance Support | 6/6/2024 |
| 5 | 1 Improve Community Experience | Matt Hess | Community Services | Team Lead | 7/1/2024 |
| 6 | 1 Improve Community Experience | Deborahann Gentry | Code Compliance | Team Member | |
| 7 | 1 Improve Community Experience | Scott Waite | Police | Team Member | |
| 8 | 1 Improve Community Experience | Sean McGary | Parks and Recreation | Team Member | |
| 9 | 1 Improve Community Experience | Tonya Castro | Court | Team Member | |
| 1 | 2.1 Improve Asset Management | Jamsheed Mehta | City Manager's Office | City Management | 5/1/2024 |
| 2 | 2.1 Improve Asset Management | Michelle Woytenko | Field Operations | Executive Sponsor | 5/16/2024 |
| 3 | 2.1 Improve Asset Management | Ron Serio | Water Services | Executive Sponsor | 6/4/2024 |
| 4 | 2.1 Improve Asset Management | Jeff Bratcher | Org Performance | Org Performance Support | 6/27/2024 |
| 5 | 2.1 Improve Asset Management | Lisa Esquivel | Water Services | Team Lead | 7/29/2024 |
| 6 | 2.1 Improve Asset Management | Craig Croner | Field Operations | Team Member | 8/5/2024 |
| 7 | 2.1 Improve Asset Management | Jun Okabe | Budget and Finance | Team Member | |
| 8 | 2.1 Improve Asset Management | Sheila Reddic | Innovation and Technology | Team Member | |
| 9 | 2.2 Improve Resource Alignment | Vicki Rios | City Manager's Office | City Management | 5/12/2024 |
| 0 | 2.2 Improve Resource Alignment | Levi Gibson | Budget and Finance | Executive Sponsor | 5/29/2024 |
| 1 | 2.2 Improve Resource Alignment | Ryan Freeburg | Fire | Executive Sponsor | 6/12/2024 |
| 2 | 2.2 Improve Resource Alignment | Jeff Bratcher | Org Performance | Org Performance Support | 6/27/2024 |
| 3 | 2.2 Improve Resource Alignment | Jonathan Hill | Budget and Finance | Team Lead | 7/30/2024 |
| 4 | 2.2 Improve Resource Alignment | Danny Williamson | Front Desk | Team Member | 8/6/2024 |

Clearpoint list of City KPIs

ClearPoint Strategy
LOCAL GOVERNMENT
KPI LIBRARY
143 KPIs & Scorecard Measures

Track your KPIs with ClearPoint.

[Click here to learn more](#)

Sample Focus Group Brainstorming Session with Miro

Optimize Processes & Services

Objective
Optimize Processes & Services

Objective Description
We optimize our services by eliminating unnecessary regulations and procedures, simplifying processes, utilizing program evaluation methods, and making efforts to involve stakeholders in the design of programs and services.

We optimize our services by eliminating unnecessary regulations and procedures, simplifying processes, utilizing program evaluation methods, and making efforts to involve stakeholders in the design of programs and services.

Intended Results 1

- Streamlined processes
- Reduction of waste
- Continuous improvement and innovation
- Cost effective service delivery
 - Departments are collaborating on procurement needs
 - Programs and services designed with stakeholder input
 - Increased speed of delivery and value of services
- Program evaluation methods are used to determine the efficacy of existing and future programs

Streamlined processes

- Reduction of waste
- Continuous improvement and innovation
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 - Departments are collaborating on procurement needs
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- Program evaluation methods are used to determine the efficacy of existing and future programs

Current users, needs and interests of new delivery systems

Harvest best quality of existing systems to inform a new system

90%

85%

19% (3 Departments)

75%

KPIs not currently tracked but we have the data

KPIs we are currently tracking

KPIs not tracked

Objective Description

What does "Optimize Processes & Services?"

What should it include or not include?

What's missing?

Here are some steps that can be taken to optimize processes:

- Understand how work flows through the system
- Identify bottlenecks, redundancies, or inefficiencies
- Find opportunities for improvement
- Break down complex processes into manageable components
- Promote communication and collaboration among team members

Some examples of process optimization include:
Eliminating redundancies, Streamlining workflows for teams, Improving communication across departments, and Forecasting changes.

Intended Results

What should we expect?

What's missing?

Can we be more concise or streamline the current results?

Are there redundancies we can eliminate?

- Streamlined processes
- Reduction of waste
- Continuous improvement and innovation
- Cost effective service delivery
 - Departments are collaborating on procurement needs
 - Programs and services designed with stakeholder input
 - Increased speed of delivery and value of services
- Program evaluation methods are used to determine the efficacy of existing and future programs

2) % of service requests are compliant with published response or turnaround times for service requests for external customers

Monday WorkDay

Monday.com provides a range of work management and project tracking tools that help teams organize their workflows efficiently. Users can customize workflows to fit their specific needs, whether they require a simple task list or a complex, multi-team workflow. Kanban boards offer an agile-friendly approach to tracking progress visually, while Gantt charts allow teams to manage dependencies and project timelines with an intuitive drag-and-drop interface. The calendar view makes it easy to schedule tasks and projects, ensuring deadlines are met. To help prioritize work, Monday.com allows users to assign task importance levels, ensuring that critical tasks receive the necessary attention.

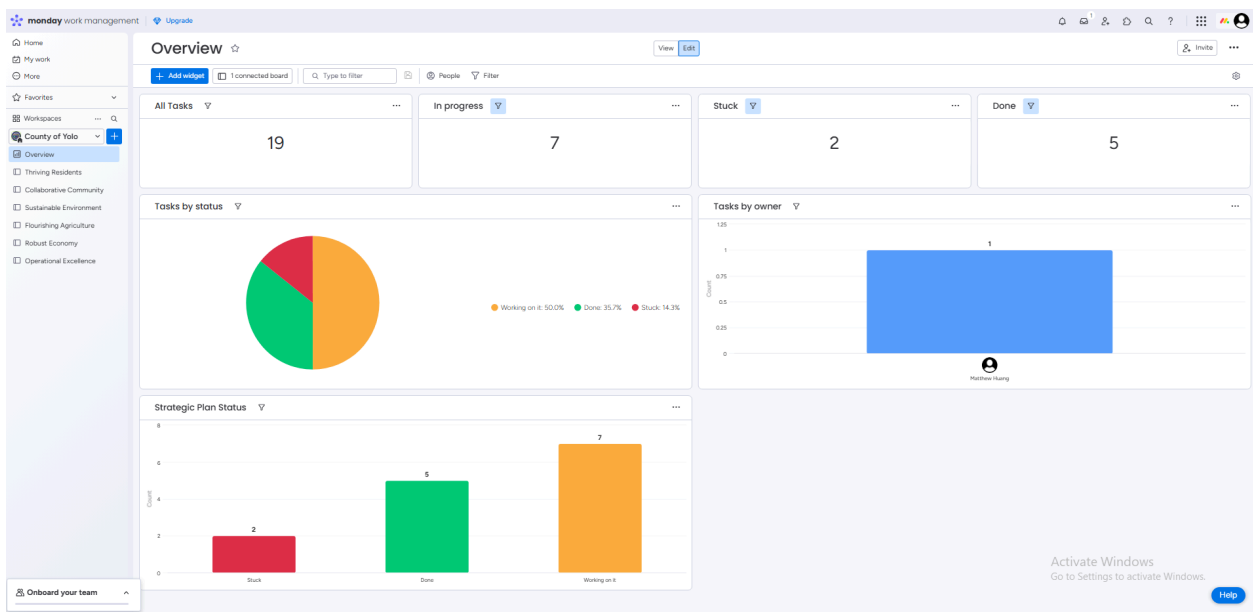
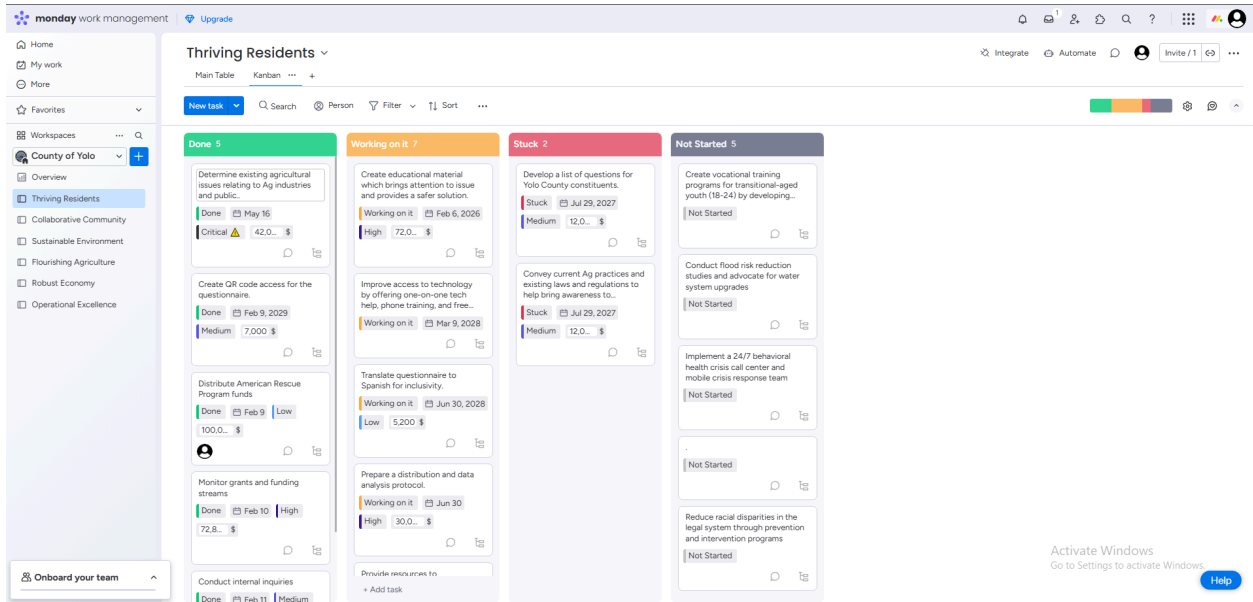
Collaboration and communication are at the core of Monday.com's functionality. Teams can stay updated with real-time notifications, file sharing, and threaded discussions that improve workflow transparency. The tagging and mentions feature helps ensure that the right team members are notified about key updates. Monday.com also integrates with communication tools like Slack and Microsoft Teams, making it easy for teams to collaborate across platforms. Guest access and permissions enable external users, such as clients or contractors, to collaborate on specific projects while ensuring that internal data remains secure.

Automation and AI-powered features reduce manual tasks and improve efficiency. Custom automations allow users to create "if-this-then-that" rules for task updates, notifications, and assignments, eliminating repetitive work. AI-powered workflows offer smart recommendations to improve productivity, while recurring task management ensures that ongoing projects stay on track without the need for constant manual input.

For teams that need advanced analytics, Monday.com provides robust data visualization and reporting tools. Users can create custom dashboards and reports to track key performance indicators (KPIs) and monitor project progress. Advanced filtering and sorting options make it easy to access relevant data, and users can generate pivot tables, charts, and graphs to visualize their performance trends effectively.

Monday.com is highly extensible, integrating with over 200 third-party applications to enhance its capabilities. Popular integrations include Google Workspace (Gmail, Calendar, Drive), Microsoft Office (Excel, Teams, Outlook), and CRM tools (Salesforce, HubSpot, Pipedrive). It also connects with development platforms like Jira, GitHub, and GitLab, as well as marketing analytics tools like Mailchimp and Google Analytics. For businesses that require custom integrations, Monday.com offers an API that allows developers to create tailored solutions.

For productivity tracking, Monday.com includes built-in time tracking features that help monitor how much time is spent on each task. The workload view enables managers to visualize team capacity, ensuring that workloads are evenly distributed and preventing burnout.



Microsoft Lists

What is Microsoft Lists?

Microsoft Lists is a Microsoft 365 application designed for structured information tracking. It enables organizations to create, manage, and share lists of information, such as project

tracking, inventory management, and issue resolution. The tool integrates with Microsoft Teams, SharePoint, and Power Automate for enhanced workflow automation.

Key Features of Microsoft Lists:

1. **Customizable Views** – Allows users to switch between grid, calendar, gallery, and Kanban-style views.
 2. **Integration with Microsoft 365** – Works within Microsoft Teams and SharePoint for seamless collaboration.
 3. **Automated Workflows** – Power Automate can be used to trigger workflows based on changes.
 4. **User-Friendly Interface** – Similar to Excel but with more collaboration features.
 5. **Security and Access Control** – Managed through Microsoft 365 permissions.
-

Why is Microsoft Lists a Good Fit for Yolo County?

1. Centralized Data Management

Yolo County's strategic plan tracking process is currently decentralized, relying on manual collection and department updates. Using Microsoft Lists can provide a centralized platform where all departments can update progress in real time while keeping records structured.

2. Seamless Collaboration with Teams and SharePoint

Since Yolo County already uses Microsoft Teams for tracking updates, moving to Microsoft Lists would streamline the process. Lists can be embedded directly into Teams, allowing department heads to update their strategic objectives without switching between different tools.

3. Simplified Progress Tracking

Yolo County uses qualitative completion status labels such as "In Progress," "Completed," and "Delayed" to track objectives. Microsoft Lists supports custom fields that can incorporate quartile-based tracking (0-25%, 25-50%, 50-75%, 75-100%), offering a more precise measure of progress.

4. Cost-Effective and Easy to Implement

- **No additional licensing costs** – Since Yolo County already uses Microsoft 365, Microsoft Lists is included.
- **Minimal training required** – The interface is similar to Excel and SharePoint, tools already familiar to staff.
- **Quick deployment** – Unlike third-party tracking systems (e.g., **Envisio, Cascade, Monday.com**) that require configuration and integration, Lists can be deployed immediately.

Limitations of Microsoft Lists for Yolo County

While Microsoft Lists is a powerful tool, there are a few limitations that Yolo County should consider:

1. Not Purpose-Built for Strategic Planning

Unlike Envisio, which is designed for government strategic planning and KPI tracking, Microsoft Lists lacks built-in strategic planning templates. Customization would be required to fit Yolo County's needs.

2. Limited Public-Facing Dashboard Capabilities

Microsoft Lists is not designed for public transparency. Yolo County's strategic plan emphasizes community visibility, but Lists does not generate external dashboards natively. However, this can be resolved by:

- Using Power BI to create a custom public-facing dashboard.
- Exporting data manually for public reports.

3. Workflow Automation Complexity

To automate progress updates, Yolo County would need Power Automate, which may require technical expertise. While it's more user-friendly than programming a custom tool, it adds complexity compared to simple status updates in Teams.

4. Scalability Concerns

If Yolo County wants to expand strategic plan tracking, Microsoft Lists may become cumbersome due to:

- Lack of advanced analytics (compared to Envisio or Monday.com).
- Potential data entry errors due to manual input.
- Limited hierarchical tracking, making it difficult to connect multiple projects to broader strategic objectives.

CS - 1

| | |
|--|--|
| <input type="checkbox"/> Title | <input checked="" type="checkbox"/> Pillar |
| CS - 1 | Sustainable Environment |
| <input checked="" type="checkbox"/> Status | <input type="checkbox"/> Department |
| In Progress - 2 | Community Services |
| <input type="checkbox"/> Strategy | <input type="checkbox"/> Action Step 1 |
| 1. Implement the Climate Action and Adaptation Plan and associated program efforts through collaboration, securing ongoing funding, and completing necessary studies to improve the County's resilience against challenges associated with climate change. | Add 3 additional Sustainability Division staff members to support the Climate Action and Adaptation Plan's efforts |
| <input type="checkbox"/> Action Step 2 | <input type="checkbox"/> Action Step 3 |
| Identify Phase 1 and 2 Priorities to achieve emissions reductions from 2024-2027 and 2027-2030. | Adopt 2030 Climate Action and Adaptation Plan (est. September 2024) |
| <input type="checkbox"/> Action Step 4 | <input type="checkbox"/> Common Departments |
| Identify and apply for 1-3 grant applications to advance Phase 1 Priorities in FY24-25. | Enter value here |
| <input type="checkbox"/> County Plan Alignment | <input type="checkbox"/> POC |
| Climate Action and Adaptation Plan | Stiles, Aaron R. |
| <input type="checkbox"/> ANNUAL UPDATE | <input checked="" type="checkbox"/> Approved? |
| Enter value here | NO |

Attachments

Add or remove attachments

Comments ▾

@mention or comment

Today



You

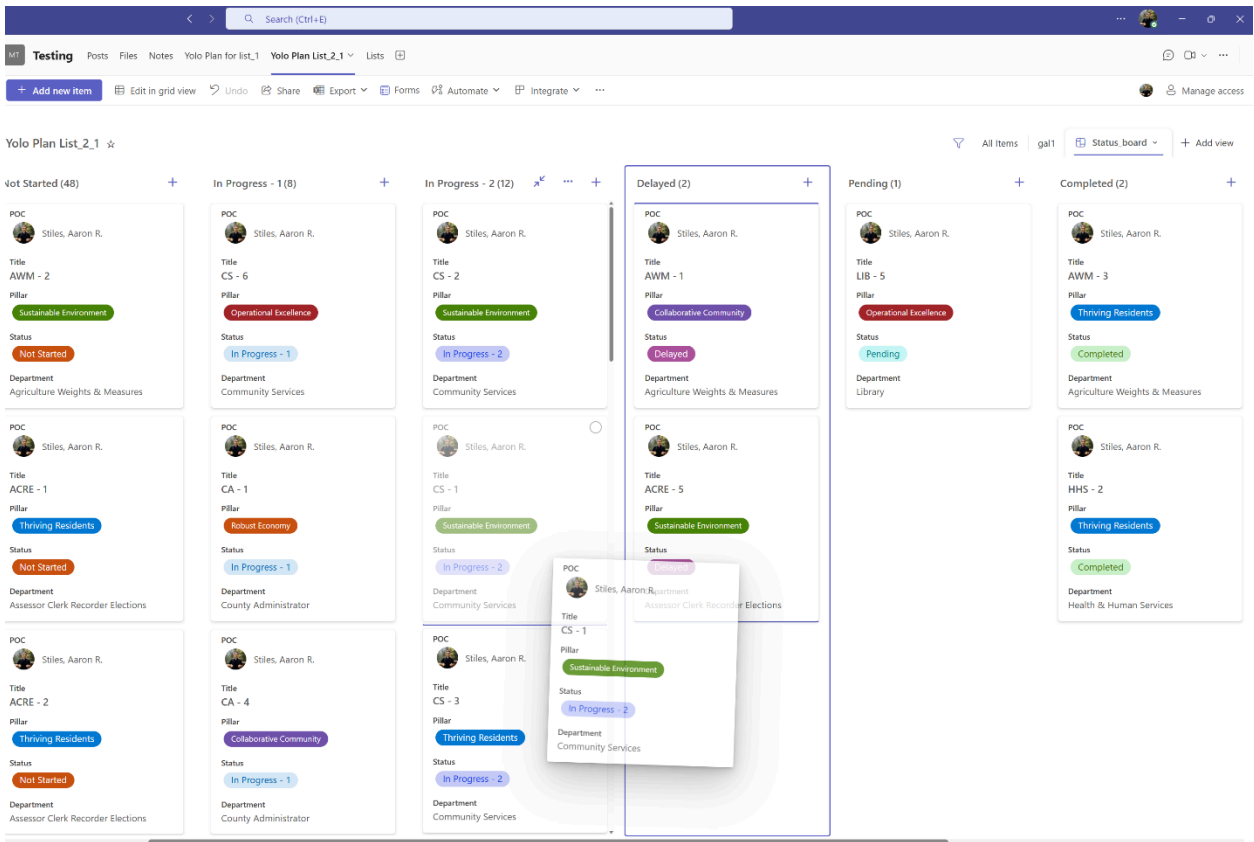
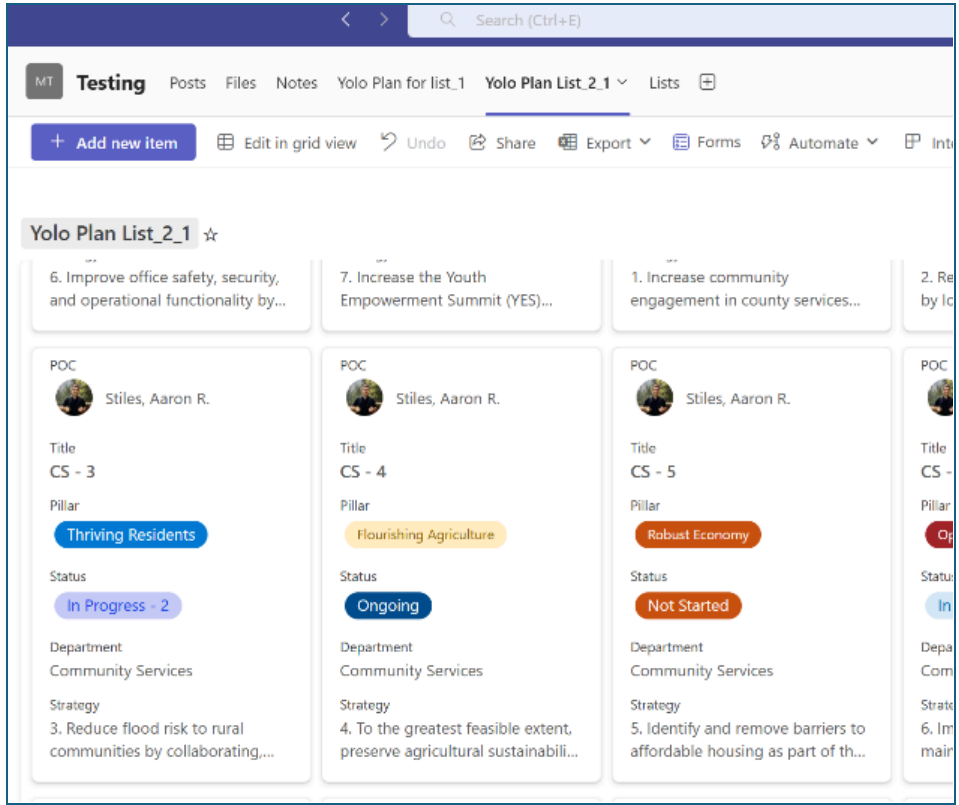
@Stiles, Aaron R. comment about this strategy. may need to revise the scope and/or ask for more funding.

Just now

Other Notes:

- When opening a “tile” from the gallery, you see all the customizable fields.
- For this model, we created it at the strategy level and added action steps underneath.
 - o One drawback is the action step fields were limited to four. You can add more, but there will be a lot of strategies that have blank actions since all of these entries have the same fields.
- You can set up an approval workflow to help distribute and collect responses.
- I added an “annual update” text field that can all the POC to only update the necessary information.
- Other fields to look into adding:
 - o Due dates
 - o Baseline and target metric
 - o Funding level

The following views in order: Gallery, Status Board (Kanban-esqe), Table



| Title | Pillar | Status | Department | Strategy | POC | Action Step 1 | Action Step 2 | Action Step 3 |
|----------|-------------------------|-------------|-----------------------------------|---|------------------|---|--|---|
| 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. | Establish classification and budget for program and necessary approvals. | Establish protocols to meet program goals | Within 6 months of prog approval, initiate recruitm his staff, designate spac obtain necessary equipm supplies. |
| 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. | Partner with vendors to identify additional document submission companies. | Educate government document submitters on the process to become an electronic submitter. | Develop a frequently ask questions (FAQ) sheet on simplified how to on how become an electronic sul |
| 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. | Determine impact base on regulatory and program requirements on industry. | Calculate and project revenue for the program. | Obtain testing equipment |
| ACRE - 1 | Thriving Residents | Not Started | Assessor Clerk Recorder Elections | 1. Distribute multilingual customer service questionnaires to Yolo County constituents by 2025 using efficient technologies to solicit feedback that will improve services and ensure public inclusivity. | Stiles, Aaron R. | Develop a list of questions for Yolo County constituents. | Create QR code access for the questionnaire. | Translate questionnaire to Spanish for inclusivity. |
| ACRE - 2 | Thriving Residents | Not Started | Assessor Clerk Recorder Elections | 2. Yolo County will coordinate at least quarterly County Road Show pop ups at various community events and locations in 2024/25 to provide ACE services and bridge transportation gaps for 1C residents in partnership with county departments. | Stiles, Aaron R. | Offer ACE Services, such as: marriage ceremonies, voter registration, and assessor staff available for property related questions. | Marriages (5) | Voter Contact (10) |
| ACRE - 3 | Flourishing Agriculture | Not Started | Assessor Clerk Recorder Elections | 3. Create new avenues for a streamlined online submission of annual production forms for agricultural property owners to the Assessor for their participation in the Williamson Act program in 2025. | Stiles, Aaron R. | Collaborate with vendors to create online submission portal for permanent user accounts. | Identify early adopters/stakeholders to participate in development and pilot. | Outreach to Yolo Farm Bn and stakeholders on new submission portal. |
| ACRE - 4 | Operational Excellence | Not Started | Assessor Clerk Recorder Elections | 4. Enhance StrengthIndex based professional development for ACE staff by coordinating with County Strength coaches to improve employee engagement in 2024/25. | Stiles, Aaron R. | Form active Strength Committee. | Develop and provide two (2) Strength-based workshops. | Meet with County Strength coaches. |
| ACRE - 6 | Operational Excellence | Not Started | Assessor Clerk Recorder Elections | 6. Improve office safety, security, and operational functionality by 2026. | Stiles, Aaron R. | Complete election's next phase of office remodel by 2025. | Complete Clerk-Recorder office safety and security remodel by 2026. | Complete Assessor office remodel and training fac 2026. |
| ACRE - 7 | Operational Excellence | Not Started | Assessor Clerk Recorder Elections | 7. Increase the Youth Employment Summit (YES) annual attendance to 200 and launch the Yolo County Youth Civic Initiative (YCYCI) curriculum throughout our high schools to promote civic education and increase civic involvement among the county's youth by 2028. | Stiles, Aaron R. | Continue partnership with YCOE and other county community organizations to grow reach. | Continue partnership with UC Davis for YES venue to accommodate larger attendance. | Garner funding through legislation or other grant support YCYCI curriculum |
| CSS - 1 | Thriving Residents | Not Started | Child Support Services | 1. Increase community engagement in county services through expanding the County Road Show, digital marketing, community presentations and other educational opportunities. | Stiles, Aaron R. | Use organic, boosted advertising on Facebook, Instagram, and Youtube to promote child support services, and determine success by increasing application for services. | Hold quarterly events throughout our jurisdiction educating parents on matters related to child support. | |

Cascade

What is Cascade? Cascade is a strategic planning and execution platform designed for goal tracking, performance measurement, and real-time progress monitoring. It enables organizations to align their strategic objectives with measurable outcomes, providing a centralized framework for planning and execution. Cascade integrates with various business tools, offers data visualization capabilities, and supports automated reporting for enhanced strategic oversight.

Key Features of Cascade:

- **Strategic Goal Alignment** – Helps organizations structure objectives, key results, and initiatives in a hierarchical framework.
- **Real-Time Progress Tracking** – Provides visual dashboards, automated progress updates, and KPI tracking.
- **Integration with Business Tools** – Works with Slack, Excel, and other platforms.
- **Automated Reporting & Insights** – Generates real-time reports and predictive insights.
- **User-Friendly Interface** – Intuitive design tailored for strategic planning professionals.

Why is Cascade a Good Fit for Yolo County?

1. **Centralized Strategic Plan Management**
Yolo County currently relies on manual processes for strategic plan tracking, making it difficult to consolidate updates across departments. Cascade provides a centralized platform where department heads can input real-time updates, ensuring structured and consistent data collection.
2. **Advanced Visualization and Dashboards**
Cascade provides interactive visualizations, charts, and public-facing dashboards that align with Yolo County's commitment to transparency. Community stakeholders can easily view progress without the need for manual exports.
3. **Automated Progress Tracking & KPI Management**
Yolo County currently uses qualitative completion status labels such as "In Progress," "Completed," and "Delayed." Cascade enhances this with:
 - Automated tracking of objectives using KPIs and key results.
 - Customizable progress indicators (0-25%, 25-50%, 50-75%, 75-100%).
 - Predictive analytics to identify potential delays before they impact outcomes.
4. **Seamless Collaboration Across Departments**
Cascade supports real-time collaboration, allowing department leaders to assign objectives, set dependencies, and track progress within a single platform.
5. **Scalability & Long-Term Strategic Execution**
As Yolo County's strategic planning expands, Cascade can scale with its needs. Cascade provides:
 - Hierarchical tracking to connect multiple projects to broader strategic objectives.
 - Advanced analytics and performance forecasting.

- Automated workflows for approvals, progress updates, and stakeholder notifications.

Limitations of Cascade for Yolo County

1. **Cost Considerations**

Cascade requires a paid subscription that varies based on the amount of users. For flagship enterprise packages, a quote can be obtained by reaching out on their official website.

2. **Learning Curve & Implementation Time**

Cascade's feature-rich platform may require initial training for staff unfamiliar with strategic execution tools.

3. **Customization & Integration Complexity**

While Cascade integrates with Excel, Powerpoint, and other tools, Yolo County may need to customize workflows and data fields to match its existing strategic framework. This setup requires some technical expertise but results in a more tailored solution.

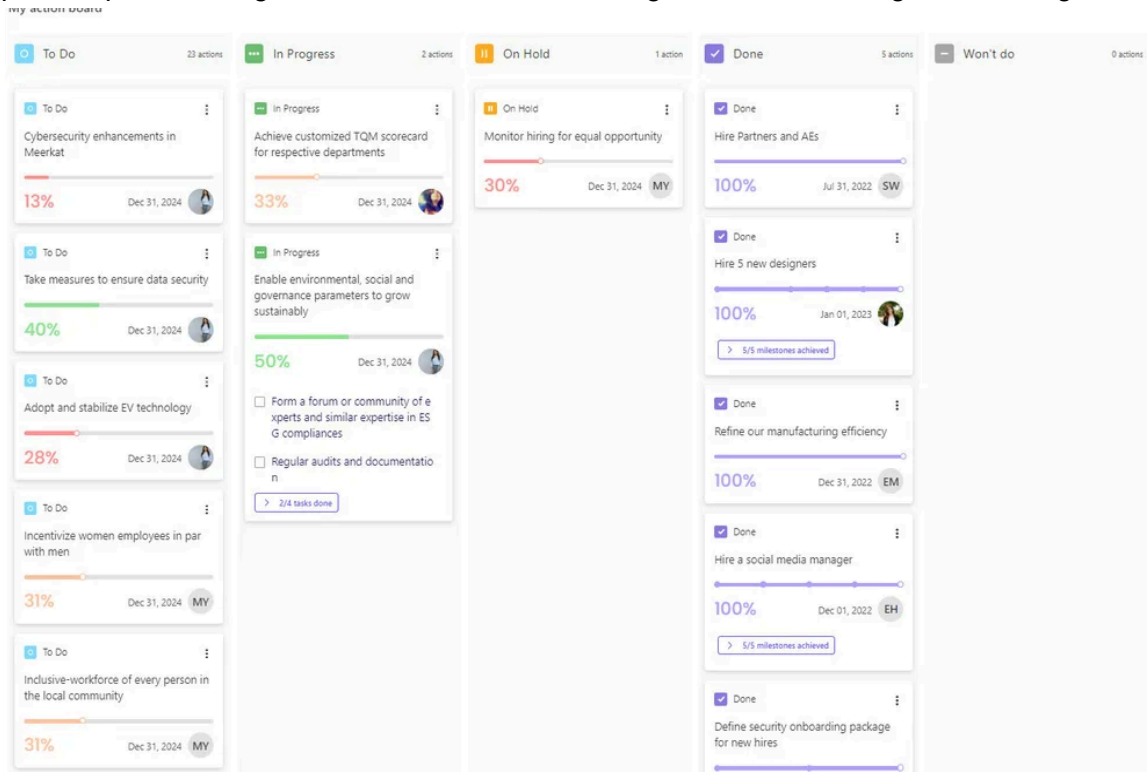
4. **Dependence on Accurate Data Entry**

Like any strategic planning tool, Cascade relies on consistent and accurate data input. Training and internal processes must be in place to prevent incomplete or incorrect data from affecting strategic insights.

Conclusion

Cascade provides a comprehensive solution for Yolo County's strategic planning needs, offering enhanced visualization, automation, and scalability. While it requires an upfront investment in licensing and training, the platform's ability to streamline collaboration, automate reporting, and

provide public-facing dashboards makes it a strong contender for long-term strategic execution.



Corporate Plan Share

Corporate plan

Mission Statement

... see more

Owners and collaborators +4

Assigned team Leadership Team

Planner Timeline

Hide completed ti Add Year 2027 Jan 01, 2024 - Dec 31, 2027

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 65% Behind
- Customize product offerings to align with regional market needs** Corporate objective Year 2027 Jan 01, 2024 - Dec 31, 2027 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

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

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

71% of 100%

Details Success criteria Updates Risks Relationships

Add description

Update schedule No schedule currently set

Owner Jack Alexander es@fama.alonca+12a@casca.de.app

Collaborators Add collaborators

Budget Allocated \$ **\$12,000**

Contributes to

Parent

 - APAC Plan Regional plan
 - Innovation and Technology Leadership

Other

 - Enhance customer experience through technology Corporate objective
 - Corporate Plan

Comments

JD Leave a comment
 - 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

Envisio

Demo built by Mark Kachmar, Envisio
mkachmar@envisio.com

[County of Yolo Strategic Dashboard](#)

[County of Yolo At-Risk Report](#)

[County of Yolo Strategic Plan Progress Report](#)

What is Envisio?

Envisio is a strategic planning and performance management software designed for government agencies, nonprofits, and educational institutions. It helps organizations align their strategic plans with operational activities, track progress, and report on performance in a transparent and data-driven way

Key Features of Envisio:

- **Customizable Plans:** Drag-and-drop interface for flexible, goal-aligned strategy design.
- **Automated Reporting:** Auto-generate reports for timely, effortless updates.
- **AI Assistance:** Streamline work plans and reporting with AI tools.
- **Centralized Data:** Aggregate performance data into one unified view.
- **Interactive Dashboards:** Visualize KPIs with real-time, dynamic dashboards.
- **Data Exploration:** Analyze trends with slicing, dicing, and drilling tools.
- **Gantt View:** Track tasks and dependencies with Gantt charts.
- **Public Dashboards:** Share data via customizable, ADA-compliant dashboards.

Why is Envisio a Good Fit for Yolo County?

1. Lack of Clear Alignment Between Metrics and Strategic Plan Pillars

- **Survey Insight:** 67% of respondents indicated that current dashboard metrics do not clearly measure progress toward specific strategic objectives.
- **How Envisio Helps:**
 - Envisio enables departments to **define and align** key performance indicators (KPIs) with **each strategic pillar** in real time.

It ensures that metrics are structured to reflect the County's **goals and priorities** in a measurable way.

2. Difficulty in Tracking and Reporting Metrics Efficiently

- **Survey Insight:** Departments struggle with **data collection, reporting tools, and dashboard accessibility**. Many rely on spreadsheets, which are cumbersome.
- **How Envisio Helps:**
 - **Automates data collection** and reporting, eliminating reliance on **manual tracking** and spreadsheets.

Provides a **centralized dashboard** for real-time performance monitoring, making data more accessible.

3. Lack of Resources & Bandwidth to Track Data Effectively

- **Survey Insight:** Several departments reported a lack of investment in **staffing, software, and tools** to track progress.
- **How Envisio Helps:**
 - Reduces **administrative burden** by **automating performance tracking**, allowing departments to focus on service delivery instead of manual data entry.

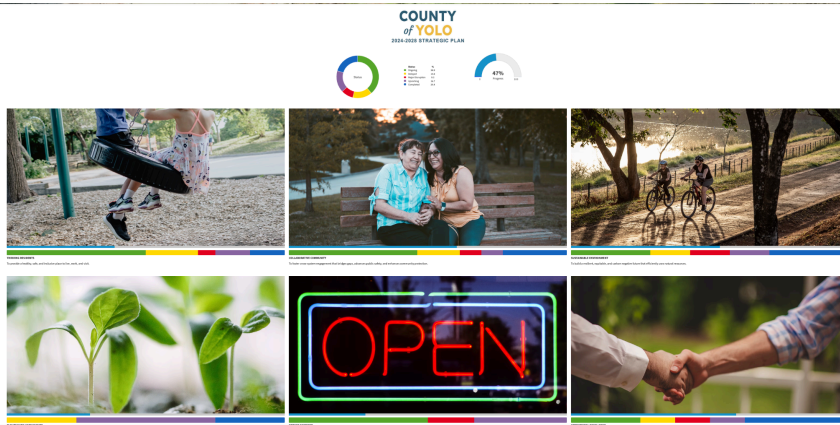
Helps departments track **quantitative, qualitative, and milestone-based** metrics effortlessly

4. Inconsistent Reporting & Data Gaps

- **Survey Insight:** Many departments cited data gaps that hinder their ability to measure progress.
- **How Envisio Helps:**
 - Facilitates cross-departmental data integration, ensuring consistent reporting across all county agencies.
 - Allows departments to fill data gaps by incorporating multiple sources into a unified dashboard.

Limitations of Envisio for Yolo County

- **Learning Curve:** Training may be more extensive to use this premium software
- **Cost and Licensing:** Premium product could become expensive if additional customization needs are required
- **Data Integration Challenges:** If integration is unavailable to the systems at Yolo County, manual data entry may be required



Santa Cruz County Strategic Plan Interview – 1/30/25

I. Introduction & General Questions

1. Could you briefly introduce yourself and your role within Santa Cruz County?
 - One of two assistant CAOs. Since 2017
 - Work with public safety and
 - Oversee SP and Operational planning efforts.
 - Use to be a principal analyst.
 - Thinking through how they create a strategic plan.
 - XXXXXX is now the PA on the strategic plan and operational plan manager.
2. Can you provide a quick overview on how Santa Cruz County's strategic plan is structured?
 - Create a SP > creates Objectives and operational plan.
 - 6 year plan SP. 2018 – 2024.
 - 2-year operational plan for tracking.
 - Currently refreshing the plan. Will take a plan to the board for 2026. Should be another 6 year period.
 - Use Operational plan to track and move forward.
 - Twice a year for reporting on operational plans.
 - Two year operational plans is how they see how they're moving.
 - Community indicators from "Datashare Santa Cruz" county website.
 - Selected metrics from the Datashare website.
 - Community indicators.

II. Tracking the Strategic Plan's Progress

1. How does the county currently track and measure progress on strategic initiatives?

- Did not have performance indicators before making the county's first strategic plan. Having indicators before the plan is made allows for a better understanding of a baseline. Also ensures you're selecting the best community indicators to judge a plan's effectiveness.

2. What specific **performance indicators** or **key metrics** are used to assess progress?

- Previous Indicators:
<https://www.datasharescc.org/tiles/index/display?id=248282882521046480>
- New Indicators:
<https://www.santacruzcountyca.gov/VisionSantaCruz/communityresults.aspx>
- Only improvement in the indicators has been in homelessness.
- Still trying to figure out how to improve on the indicators.
- Will choose more indicators in the future..
- Sven, chair for the data and equity committees, has conversations with the committees about data. The group chooses a list of data and plans that are worth considering. Also staffs the Cares and Justice work group. Talks about county efforts in DEI. Had discussions with them on what made sense for indicators.
 1. Also talks with county leadership.
 2. Need a mix of internal and external staff to develop indicators.

3. Does the county use **qualitative** or **quantitative** data, or both, when assessing progress?

- Operational Plans are created at the senior management level within the departments.
 1. Driven at the department level. But its not imposed by the CAO.
- Departments chose the reporting data and select operational targets to meet.
- Health Service Agency is good at creating quantitative targets. Other departments are not as good. The quality of the targets and goals vary.

4. Can you walk us through the **reporting structure**? Who is responsible for collecting and analyzing data?

- CAO does the collection of the data. Uses Power BI and has a mechanism through Microsoft Teams to keep track of each objective and direct communication with key players for that objective.
 - Creates 'Lists' and 'cards' in MS Teams.
 - Allows for comments and direct communication between CAO and department officials.

1. How do county departments report their progress, and how is that information aggregated at the county level?
 - Uses SMARTIE framework to generate an Objective.
 - 'Key steps' are how the departments execute the overall objective.
 - Indicate schedules.
 - Baseline. Target. Units. Progress
 - Notes and communication is recorded in the MS Teams Card.
1. How long did the transition take between excel and MS Teams?
 - Everyone including the departments adapted quickly.
5. What tools or platforms does the county use to track performance data? (e.g., dashboards, databases, internal reports)
 - Public facing dashboards on the website are internally generated. They have 2 web developers that generate a custom dashboard based on the updates from MS Teams.
 - They looked at 'scorecard' and other products. Didn't want to use them because they might not have
 - Whatever way you go, there won't be automation. Customization allows for what the county wants exactly.
 - Not all counties have the web developer skill.
6. How frequently is progress reviewed, and what steps are taken if targets are not met?
 - Only doing it twice a year.
 - End of November CAO send request. Deadline of Christmas. Go to the board on Jan 28th with the updates. Have a summary of the updates, ISD will update the website.
 - Start in May, collect in June, publish in July/August.
 - They have a team of analysts in the CAO. About 50-60 people countywide that have some touchpoint
7. Can you provide an example of a specific initiative where tracking led to adjustments in strategy or policy?
 - When not meeting the objective:
 - Find out why, figure out the updated due date. Tell the board the reason why.
 - Have also gotten rid of objectives if they don't make sense anymore. Combine or delete. Update the board each time.
8. Have you identified any gaps in data collection or analysis that you are working to improve?
 - Biggest challenge overall:

- Trying to get lower level staff involved so there is greater ownership and accountability.
- Managers and leaders are coming up with objectives that do not make sense. Lower level staff have to implement so it should make sense.

III. Reporting & Accountability

1. What mechanisms are in place to ensure **accountability** if strategic plan targets are not met?
 - Tying the objectives that departments bring to the board of supervisors to the strategic initiatives
 - Projects are included on the board of supervisors meeting agenda. The Departments have to tag how their initiatives support the strategic initiatives.

donation of gift, is done pursuant to a separate contract from the construction contract for the Covered Project, and that no part of the project is funded with public funds.

Next Steps

Upon approval of the Board of Supervisors, the Trades Council will forward to the North America's Building Trades Unions (NABTU) for review and then back to the local Trades Council for signatures. Once executed, the PLA covering the Pilot Program will be returned to the Board Chair for signature. County staff will begin to incorporate the PLA into the future Covered Project bid documents and work with the affected departments, the Trades Council, and labor unions to start collecting data of the PLA effectiveness.

Financial Impact

The future financial impact to the County of entering into a PLA for each of the Covered Project in the Pilot Program is unknown other than there will be a new cost associated with the Project Labor Coordinator function. Proponents state that a project labor agreement ensure experienced, trained Union labor and allow for expeditious resolution of disputes ensuring that a project is delivered on time, on budget, that safety and quality standards are maintained, and compliance with payment of prevailing wages and benefits to trades and crafts workers is achieved. Opponents state that project labor agreements overlay an additional layer of bureaucracy for compliance and administration that may not significantly enhance project outcomes, deter some contractors from bidding thereby reducing competition, and in general increase project costs.

Body

Strategic Initiatives

- 5.A (Regional Workforce)
- 5.C (Local Business)
- 5.D (Educational Opportunity)
- 3.C (Local Roads)
- 6.C (County Infrastructure)

Meeting History

| Dec 17, 2024 9:00 AM Video | Board of Supervisors | Regular Meeting | Draft |
|---|----------------------|-----------------|-------|
| Recommended Actions | | | |
| 1) Approved Project Labor Agreement with Monterey and Santa Cruz Counties Building and Construction Trades Council for use on specified projects as part of the County Pilot Program; | | | |
| 2) Authorized the Board Chair to execute the Project Labor Agreement on behalf of the County; | | | |
| 3) Authorized the Director of General Services, or designee, to implement the Project Labor Agreement Pilot Program and take related | | | |

Sonoma County Interview – 1/28/25

1. Introduction

- **Principal analyst** – report up to the deputy county administrator.
- **Leads the project manage**
- **Completed year 3, have two more years.**
- **Feb 11th – annual update to the Board.**

2. General Questions

These will provide an overview of their system before moving into specifics:

1. "Could you start by providing a brief overview of how Sonoma County's strategic plan is structured and tracked?"
 1. Community related meetings, and internal meetings. Made the five pillars.
 2. Have analysts on the team responsible for specific pillars.
 1. Two on climate
 2. One on the Op Ex pillar
 3. Tracking communities
 4. Tracking is not throughout the year.
 5. In Year 1.5, the county tried to get on to Envisio.
 6. This one is the first one they've had in a long time. Post -2017 fires.
 1. Envisio was too hard to use.
 2. No unifying metrics to be used across metrics.
2. "What do you consider the key elements or tools that make your tracking and implementation system effective?"
 1. For the analysts, it about the relationships and people.
 2. CAO is always asking to do it.
 3. We're relying on them to
 4. Word form to get updates from **who?**
 1. IT department is the person that moves the strategic plan progress bar.
 2. Use the tool for the community to keep informed.

~~3. "How do you balance the need for flexibility in your strategic plan with the accountability of meeting specific goals?"~~

3. Drill Down into Specific Areas

Tailor this based on the key themes you want to address:

- **Tracking System:** Could you walk me through how it was designed and implemented?
 - What criteria or metrics determine the percentage of completion for each goal or objective?
 - Taking the department's word on what the % is completed. If it seems like it makes sense, then the analysts accept as is.
 - They have to determine the funding status as well. The board pays close attention to why.
 - Are the objectives tied to funding?
 - Not necessarily. OpEx is internal facing, so not specifically funding related.
 - Examples: Compliant from internal and external entities made the County get a consultant.
 - There was a metric section as part of the **implementation plan**.
 - Are you keeping to that?
 - Sometimes they do, other times they have to pivot based on the circumstances.
 - Are they quantitative, qualitative, or a mix of both?
 - How did yall determine the metrics to use for each goal or objective?
 - Ask the departments. They try to be quantitative.
 - are you using a custom system or is it from a third-party software system to track and display your progress?
 - IT updates the website.
 - Envisio pain points – too complicated for people to learn.
 - Who updates?
 - Predecessor's intent was to have the departments upload but they ended up having to do it themselves..

- **Day-to-Day Implementation:** What does the daily process look like for staff updating progress on strategic goals? Who is responsible, and how is this managed?
 - How frequently do staff update progress on goals and objectives, and what is the process for making these updates?
 - In the fall, they create a word template. Questionnaire.
 - Ensure contacts are accurate.
 - CEO has a monthly meeting. Gives updates to the heads that this will happen soon.
 - Analysts follow-up.
 - Find the % completed.
 - Do funding allocation.
 - Have a deadline.
 - There's a vetting of the update. May have additional questions. Analysts will have to edit.
 - Updates are in Feb. coming up Feb 11th. For the board of supervisors meeting.
 - Who is responsible for inputting data into the tracking system, and how are roles assigned across departments?
 - The analysts are in charge but this is not their primary role.
 - Healthy and Safe communities – deal with department heads.
 - But other goals it depends. Could be a designees.
 - Are there specific guidelines or templates provided to staff to standardize daily updates and reporting?
 - The questionnaire.
 - Quality of responses on the updates vary a lot.
 - Have you had to adjust the criteria for tracking progress during the strategic plan cycle, and if so, what drove those changes?
 - What is the mechanism for changing objectives?
 - Opportunities to change during the annual
 - Editorial changes don't need to be approved.
 - Big changes that require reallocation, need approval.

- If it has to do with funding – it goes to the board
 - Anything else, you make the change
 - No mechanism throughout the year, only during annual.
 - (ie., can you just change the goals/objectives when necessary or do you have to formally revise the strategic plan via some official act)?
 - Don't revise the PDF, only the website.
 - 15 projects that are under 50% completion. Only a couple might not make 2026.
 - Website tries to be transparent but its still high-level.
 - Year 2 – work with budget team to ensure the projects get put the schedule. But if they haven't got that in, they need to get on the annual budget cycle. However, that doesn't happen often.
- **Lessons Learned:**
 - what were the biggest challenges in designing and implementing your tracking system, and how did you overcome them?
 - Departments have their own strategic plans and priorities.
 - Not enough staff and budget to ensure the objectives are complete.
 - If you could improve one aspect of your system today, what would it be?
 - They want to automate, but its hard.
 - More frequent updates.
 - Enviso was supposed to have more updates throughout the year but that became too cumbersome.
 - Haven't done a cross-reference of department priorities and the overall plan. There are major overlap, but its not.
 - 5 questions in their questionnaire for the annual update.

Internal Library Interview

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

- 2 years in role
- https://yolocountylibrary.org/strategic_priorities/
- Counties: Library not included. Jerardo Penedo: CAO, worked with Diana and BOS to incorporate Library into strategic plan. Was the library's first time being incorporated in.
- Management Team: Worked on a shared document
- Management Team (7 people) Me, Librarian, Regional Managers, Library Regional Supervisors (Fiscal Officer)
- Report: California State Library: Summer Reading Other Metrics

Does not function the same way.

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

- Diana is not the one who does the reporting.
- Measure: How many books were given away? How many participants were done throughout the summer?
- Earn prizes: Books,

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?

- Woodland Library is not a part of the Yolo County Library
- 7 locations total branches and a branch at elementary.

- Committees
 - o Circulation committees
 - o Social media Committee.

- Staff at different levels
- Hourly graphic designer
- Works to design social media

Archives and Yolo County historical information.

- Oversee Gibson Parks

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

Do you believe that your department streamlines initiatives effectively?

****communication can always be improved****

- Weekly Meetings
- Use of library systemwide email
- Black history month
- Utilizing phone phone conversations
- Good job of documentations (agendas & minutes)
- Shared Drive

What metrics do you use to track the pillar(s)? What are the most critical metrics to measure success across these pillar(s)? I. How do these metrics help in tracking progress? II. 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?

How many people were served?

Measure circulation for devices

Hand clicker for number of participants

Keep track of how many people attended Keep track of families that have been reached.

Data collection gaps:

- Does not get a lot of money from general fund
- Property Taxes
- Rely heavily from money from friends group.
- Relies heavily on Library foundation (separate group)
- Not drilling down data
- Doing a better job of keeping detail of records

What is your preferred metric reporting cadence?

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

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

- Davis site opening
- Currently has a Davis library
- There was a need for a second library in Davis
- Poverty is much higher
- Got the grant, once in a lifetime grant
- All the budget was what they were looking at. Worked with City of Davis
- Hoping to do that in February for starting project.
- Alleviate crowding at other branches.
- Will close elementary branch

Did you respond to the survey sent out through Cindy?

- Yes

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

- No

Internal Financial Services Interview

- Did you receive the survey from the County Administrative Office?
 - Yes, but there was a question I couldn't answer because "I don't know" wasn't an option.
 - The survey was limited to reporting and dashboard-related topics.

- What are your thoughts on the current dashboard?
 - Doubts many people visit the dashboard and suggests tracking web traffic.
 - The dashboard's purpose needs clarification—what are we trying to accomplish?

- Do you have any recommendations for improving the dashboard?
 - It is too broad and doesn't reflect the full scope of county work.
 - **A better approach would be a high-level dashboard with department-specific links for deeper insights.**

- How do you communicate progress with the public?
 - Department regularly holds public meetings, community advisory committee sessions, and outreach events.
 - The strategic plan dashboard doesn't necessarily reflect the public's interests or how they want to engage.

- What type of information should be prioritized for public visibility?
 - The dashboard should focus on public interest topics, such as animal services and water access, with clear, concise updates.
 - The public needs specific and easily consumable data rather than high-level strategic initiatives.

- Would linking department-specific dashboards be helpful?
 - Yes, instead of a one-size-fits-all dashboard, each department should have a dedicated space with relevant updates.

- How does your department define success?

- Success is measured by action completion, but some initiatives depend on budget allocations
- Reporting is done reactively when the CAO's office requests updates rather than as a proactive strategy.
- What kind of data does your department track, and how does it relate to the strategic plan?
 - The department has multiple data systems depending on the division.
 - Some updates don't require complex data tracking—just status updates
 - Some areas, like well permit approvals, could benefit from GIS mapping or an infographic explaining the process.
- How does your department report strategic plan progress to leadership?
 - Updates happen once a year when the CAO's office requests status reports.
 - Departments submit updates which are compiled into a board presentation.
 - Once presented, the strategic plan webpage is updated, but there is no ongoing monitoring beyond this annual process.

Internal Community Services Interview

1. Did you receive the survey from the County Administrative Office?

- Yes, but there was a question she couldn't answer because "I don't know" wasn't an option.
- The survey was limited to reporting and dashboard-related topics.

2. What are your thoughts on the current dashboard?

- She doubts many people visit the dashboard and suggests tracking web traffic.
- The dashboard's purpose needs clarification—what are we trying to accomplish?

3. Do you have any recommendations for improving the dashboard?

- It is too broad and doesn't reflect the full scope of county work.
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6. Would linking department-specific dashboards be helpful?

- Yes, instead of a one-size-fits-all dashboard, each department should have a dedicated space with relevant updates.
- For example, Animal Services could have metrics on adoptions, euthanasia rates, and shelter updates.

7. How does your department define success?

- Success is measured by action completion, but some initiatives depend on budget allocations
- Reporting is done reactively when the CAO's office requests updates rather than as a proactive strategy.

8. What kind of data does your department track, and how does it relate to the strategic plan?

- The department has multiple data systems depending on the division.
- Some updates don't require complex data tracking—just status updates
- Some areas, like well permit approvals, could benefit from GIS mapping or an infographic explaining the process.

9. Are there any missing metrics that should be included in the dashboard?

- The public would benefit from more specific information
- Many initiatives require manual reporting, which is time-consuming and resource-intensive.
- A dashboard redesign should focus on ease of reporting and linking to detailed departmental updates.

10. How does your department report strategic plan progress to leadership?

- Updates happen once a year when the CAO's office (Cindy) requests status reports.
- Departments submit updates which are compiled into a board presentation.
- Once presented, the strategic plan webpage is updated, but there is no ongoing monitoring beyond this annual process.

Flourishing Agriculture Interview

2/7/25

1. What are the current goals of the Flourishing Agriculture initiative?

- Promote and protect agriculture within the county to ensure long-term viability.
- Preserve rich agricultural production amid development pressures
- Support agricultural sustainability through partnerships, such as with UC Davis.
- Maintain agricultural land use despite urban expansion

2. What current challenges does the department face?

- No formal metrics are currently in place to measure the success of this pillar
- The initiative was part of the county's plan before current leadership's tenu
- Potential future metrics could include:
 - Measuring agricultural land loss compared to other counties
 - Setting goals to minimize agricultural land loss (e.g., keeping it under 1%).
 - Establishing clear geographical buffers between agricultural and urban areas
 - Studying models from counties like Napa, which has a codified agricultural reserve

3. Do you have any recommendations for improving the dashboard?

- Comparative models and approaches:
 - Napa County Model - Well-defined agricultural reserve that prevents development in designated areas
 - Uses historical comparisons, such as Napa's land use vs. Santa Clara's urbanization.
 - This method could be adapted to measure agricultural preservation efforts in Yolo County.
 - Current County Approach:
 - Some areas are designated for agriculture (AR zones) but are not fully protected from development.
 - If agricultural land is converted, there is a requirement to conserve a set amount elsewhere.
 - Policies exist, but no guarantee of permanent preservation.
- Existing Data and Gaps
 - Number of agricultural workers employed in Yolo County farms
- Key Missing Data Points:

- Number of acres in production
- Variety of crops grown
- Rate of agricultural land conversion

4. Would you be open to the idea of introducing focus groups as a means of defining KPI's?

- Previous community meetings during the seed plan development had limited agricultural industry engagement
- The agricultural sector tends to be insular, making participation challenging
- Establishing focus groups to track agricultural metrics could be beneficial but difficult to implement.

5. Do you have any future initiatives planned?

- No formal initiatives planned, but key areas of interest include:
 - Expanding data collection on agricultural land use
 - Improving stakeholder engagement with external entities
 - Establishing better tracking methods for agricultural land conservation.

Operational Excellence Interview

2/7/25

1. What are the current goals of the Operational Excellence initiative?

- Prior: did not have Operational Excellence Pillar
 - Not everyone was represented within the plan
 - Highlights everyone in the plan
 - Under viewed departments
 - More Cost Efficient
- Metrics
 - Still thinking that through
 - Get other perspectives on what that could be.
 - How are investments benefiting the county?
 - How can we demonstrate steps to take and renew new systems?
 - How do we demonstrate new efficiency?
 - What first comes to mind
- Outliers
 - General statement
- Plan split into two sections
 - Pillars: thematic/cross-organizational structures
 - How can we capture success at a thematic level?
 - Too granular information but does not tell the full scope
 - How can we engage in thematic organizational?
 - How can we capture the thematic elements?
- Reliance of external sources
 - Depends
 - Inefficient data gathering (previous dashboard)
 - How can we use the resources that we already have?
 - Get a sense of what other best practices are out there?
- Anything more than quarterly would be more difficult
- More manual, the stronger the cadence
- More than quarterly no more than semi-annually

Focus Groups Interview

2/25/25

Glendale, Arizona

1. *Define an objective (as per the slidedeck):*

In a Balanced Scorecard (BSC), an objective is a specific, measurable goal within a strategic perspective that an organization aims to achieve. These objectives, along with measures and initiatives, help translate strategy into actionable plans and measurable outcomes. Strategic Objectives are the actions we must implement into our daily activities in order to see improvement in our strategies. They break down abstract concepts like mission and vision into actionable steps.

2. *Assemble the right team - how was this decided and implemented?*

I believe you said it was decided by the department heads but we'd like to know a little bit more about this if possible. What we did was ask each department director which of the 10 objectives they felt their department has the biggest connection or contribution to the city's overall mission. We then asked them to appoint focus group members for each objective they wanted to participate in. Some departments participated in multiple objective teams (focus groups), some did just one. There were some natural connections, for example: Budget & finance tied nicely to our financial objectives, HR to our workforce development objective, and our communications department with our stakeholder engagement and communication objectives. I didn't send the whole list, but on average we had 5-8 department representatives for each group.

3. *Was there a methodology for the discussions, such as an open discussion or the use of SWOT analysis to refine ideas?*

When we do scorecard development, we typically use a standard facilitation approach/template. We start with a SWOT, then a customer value proposition which helps us determine our mission/purpose. From there we then get into the core scorecard development areas: Objectives>Objective Map>Intended Results>KPIs>then initiatives. We simply spend time defining what those are and use brainstorming techniques to generate idea development, then as a team refine each of them. We work in that top to bottom order (objectives down to initiatives), sometimes folks get them mixed up (i.e., think an initiative is a KPI). We simply facilitate that learning along the way, and put those thoughts in a parking lot and come back to them when there is a

better place for it in the scorecard. Note: For this last revision, we modified our approach a bit since we did not change our mission, vision, objectives. We simply discussed whether there was a significant customer or stakeholder change, and went straight into updating the existing objective statements. It was more about asking ourselves what was still relevant and what had changed.

4. *Were there key parameters for KPI development?*

We strive efficiency and effectiveness our outcome based KPIs, since balanced scorecard is based on improving performance. So some on the go learning from the team as we work through this piece. The other big focus area was making sure we had the ability to track the KPIs we said we were going to track, the previous plan was ambitious but not always realistic in terms of what we had the ability to actually track

5. *Were the KPIs rolled out on a trial basis to evaluate their effectiveness and were review sessions held to determine efficacy?*

We start with data collection first, once we have the data we publish. So no there is no trial, we continuously evaluate the KPIs (quarterly reviews) to determine what the data is telling us. The scorecard is a living document so if we need to make adjustments along the way we can.

6. How did you ensure that the KPIs remained relevant over time?

Similar response to the previous question, but we constantly review the data. So when a KPI shelf life has expired, we ask ourselves what is the value in continuing to monitor it. Balanced Scorecard is about improving performance and if you have a KPI target that achieved its max target or is now always at 100%, then typically there isn't much value in continuing to track it. It's a case by case assessment, because there could be external stakeholder value in seeing the data (i.e. public safety or financial data), so its not an all or none answer. Just use good judgement as an organization to decide where we, our residents, businesses and employees could see value.

Links for obtaining CA County Demographics

Sonoma County:

<https://datausa.io/profile/geo/sonoma-county-ca#demographics>

Santa Cruz County:

<https://datausa.io/profile/geo/santa-cruz-county-ca#education>

Yolo County:

<https://datausa.io/profile/geo/yolo-county-ca#education>

Dashboards found through Internet Research

| County/ Municipality | link | Dashboard System | Contact(s) | Comments | Other Notable links |
|---------------------------|---|------------------|--|--|---|
| Richland, WA | https://performance.envisio.com/dashboard/cityofrichland3101 | Envisio | Assistant City Manager, Drew Florence at 509-942-7317 or dflorence@ci.richland.wa.us . | - updated quarterly - 5 key priorities (aka pillars): High-Performance Government Financial Sustainability Focused Development Quality of Life Engaged Workforce | https://www.ci.richland.wa.us/government/2024-2026-strategic-plan/strategic-plan-dashboard |
| Placer County, CA | https://www.placer.ca.gov/88707/Placer-County-Strategic-Plan | ? | County Executive Office? Phone 800-488-4308 Alternate Phone: 530-889-4030 | - Critical Success Factors: strategic relationships, diversity of achievable housing throughout the county, public serving infrastructure and amenities, outcome focused economic development, prudent and comprehensive financial planning fiscally sustainable public safety services, innovated county services, balanced land use planning and environmental stewardship | https://www.placer.ca.gov/7205/Critical-Success-Factors |
| Santa Cruz County CA | https://www.santacruzcountycalifornia.gov/VisionSantaCruz/StrategicPlanandEquityFramework.aspx | ? | vision@santacruzca.gov | - GOALS (aka pillars): Comprehensive Health & Safety, Affordable Housing, Reliable Transportation, Sustainable Environment, Dynamic Economy, Operational Excellence | https://www.santacruzcountycalifornia.gov/VisionSantaCruz.aspx |
| Yolo County, CA | https://yolooperforms.yolocounty.org/Home | | | | |
| Sonoma County CA | https://socostrategicplan.org/ | ? | County Administration Building 565 Administration Drive Suite 104A, Santa Rosa, CA 95403 Google Maps™ Directions Opening Hours: Mon – Fri: 8:00 am – 5:00 pm Phone: (707) 565-2431. Benjiman - Executive Assistance Maggie Luce - maggie.luce@sonoma-county.org | | |
| City of Carlsbad | https://experience.arcgis.com/experience/106437f6e1364996b3e08b656e9f17f/page/Plan-Snapshd/ | | | | |
| City of San Marino | https://performance.envisio.com/dashboard/CityofSanMarinoFY1920 | | | https://sanmarinocalifornia.gov/government/departments/city_manager_s_office/performance_management.php | https://cityofsanmarino.app.envisio.com/corporate/performance_analytics/published/QFRARRS |
| City of Castle Pines (CO) | https://www.castlepinesco.gov/strategic-plan/ | | | | |
| City of Corona | https://performance.envisio.com/dashboard/cityofcorona2172 | | | | |

Dashboards found through Internet Research continued

| County/Municipality | Link | Dashboard System | Contact(s) | Comments |
|---------------------|---|---------------------------------------|--|--|
| Rockville, MD | https://performance.envi.sio.com/dashboard/rockvillemd3023 | Envisio | Dave Gottesman, Assistant City Manager | <ul style="list-style-type: none"> - Recently presented to Council and Mayor of Rockville for 'Results Rockville' initiative - Intuitive, high customer service orientation - Climate Action Dashboard Example w/ Envisio |
| Gaithersburg, MD | https://performance.envi.sio.com/dashboard/gaithersburgmd | Envisio | Hazel Monae, City Manager's Office | <ul style="list-style-type: none"> - Upward Mobility Framework - resource for KPI's |
| Glendale, AZ | https://www.glendaleaz.com/your_government/city_manager_s_office/departments_of_organizational_performance/performance_dashboards | Utilizes several different dashboards | Jeff Bratcher, Organizational Performance Manager | <ul style="list-style-type: none"> - Advocate for focus groups to produce KPI's |

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