



# Integrated Management Project (IMP) Proposal Submission Form

Sponsor Information	
<b>Company or Organization:</b> Yolo County CA	
<b>Sponsoring Executives' Name(s) &amp; Title(s) - If more than one:</b>  Secondary Contact: Mark Bryan	<b>Sponsor's Chief Contact/Team Liaison's Name &amp; Title:</b>  Cindy Perez - Associate Management Analyst, County Administrator's Office
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<b>Home Page:</b> www.yolocounty.gov	<b>Physical Address:</b>  Project will be conducted 100% remotely.
<b>Date:</b> 11/15/2024	<b>Expected Project Period:</b> UC Davis 2025 Winter Academic Quarter (Jan. to March 2025)
Organizational Overview	
<p><b>Please provide a brief overview of your company/organization/entity - including a description of your specific group/department (if applicable).</b></p> <p>The County of Yolo, California ("Yolo County") is located near Sacramento in northern CA. Yolo Country is also the location of a significant portion of the facilities associated with UC Davis. Yolo Country aspires to be a location of choice for employers and residents, and features a high quality of life for its diverse population. To make the County an even more attractive place to work/live, the county government seeks to both: 1) prioritize its resources to align with its recently developed 2024-2028 Strategic Plan; and 2) develop metrics that can be tracked on a regular basis to measure the progress toward achieving the goals of that Strategic Plan.</p>	
Organization's Situation/Background	
<p><b>Please provide a description of the situation you are facing. What background information relates to this situation? What is prompting your interest in this project? Why have you decided to address this situation now?</b></p> <p>The County recently completed a rigorous strategic planning process to update its previous, 2020-25 Strategic Plan. The new Plan covers the 2024-2028 timeframe. The County will assess the key goals of the Plan in 2028 and issue a full report on accomplishments and progress, as well as identify relevant implementation challenges. Throughout the time period, the County will also provide transparent updates to any revisions the Plan undergoes. In addition, the Strategic Plan will be revisited annually</p>	

by County leadership in association with the County's annual budget review. That annual review will provide flexibility to make additions, interventions, and reprioritizations to the Strategic Plan - and associated budget changes if/as needed - to respond nimbly to community needs.

The Yolo County website has a page dedicated to its 2024-2028 Strategic Plan:

<https://www.yolocounty.gov/about-us/mission-values-strategic-plan>.

The Plan is built on six "Pillars:" Thriving Residents; Collaborative Community; Sustainable Environment; Flourishing Agriculture; Robust Economy; and Operational Excellence. More information about each of these Pillars is available from the PDF that accompanies this Word document. All County Departmental initiatives and projects reflect to some extent alignment with one or more of these six Pillars. These Pillars also formed the basis for the subsequent development of the County's more detailed prioritized goals.

For the 2020-2025 Strategic Plan, the County developed key metrics and a "Dashboard" for monitoring those metrics (<https://www.yolocounty.gov/about-us/2020-2025-strategic-plan>). However, it became clear that tracking some of the desired metrics in that dashboard required access to data that were not created or managed by Yolo County staff. As a result, it became difficult to track the desired metrics on a timely basis.

For the 2024-28 Strategic Plan, the County wants to update its progress every six months - using metrics that track the key objectives of the Plan. This MBA student project will – in part – develop potential metrics that Yolo County could track.

## Key Questions

### **What are the key questions that this project will/could address?**

- What are examples of important/"good practice" metrics other governmental entities are using to monitor the progress of their own Strategic Plans?
- What additional data that Yolo County does not have access to currently can be identified, captured, and analyzed for inclusion into the Yolo County Strategic Plan monitoring process? (**NOTE:** if the MBA team is to address this question, it will need at least some insights into what data the County does have access to now and how easily those data can be extracted and applied for monitoring Strategic Plan metrics going forward)
- How can the required data gathering processes associated with the tracking of Plan metrics potentially be streamlined/simplified going forward? (**NOTE:** answers to this question may come from both discussions with Yolo County staff and the research the team does into how other governments track their metrics)
- Can an easy-to-use, easy-to-comprehend Dashboard framework be developed that will allow County leaders and other stakeholders to track and assess progress against the 2024-28 Strategic Plan once the relevant data sources can be identified?

## Project Activities

### **What types of activities do you see as "in scope" for the project?**

The MBA team will perform research and analysis that informs the development of examples of how the County could monitor and track both qualitative and quantitative metrics that measure progress against the Strategic Plan. The team will not conduct a deep dive into the County's own data. Nor will the team delve deeply into the details of the 2024-28 Strategic Plan itself.

Among the activities the MBA team will undertake (subject to the time limits of a 10-week project):

- Review the Strategic Plan Pillars to understand how progress against the Pillars could be monitored and tracked using both qualitative and quantitative metrics
- Solicit feedback from County department heads via a staff survey or other engaged process to facilitate dialogue about the Strategic Plan.
- Research metrics other governmental agencies/entities use to track progress against their own strategic plans
- Recommend metrics that would provide insights to County leadership regarding the progress of key County projects that tie to one or more of the six Pillars
- Determine which data would need to be available to generate the metrics proposed for monitoring the Strategic Plan
- Develop options for potential “Dashboards” the County could use on an ongoing basis to track the metrics that would monitor progress against the 2024-28 Strategic Plan

### Project Outcomes | Deliverables

**Please describe the potential deliverables that could result from the project (e.g., competitive research report, recommendations report, business case, implementation plan, etc.):**

- Report on metrics other governmental entities use effectively that can be adapted for use by Yolo County to assess progress against its 2024-28 Strategic Plan
- Representations of several options for types of “Dashboards” the County could use to track Strategic Plan metrics and progress going forward