

City of Homer, Alaska Strategic Implementation Planning Technical Assistance Proposal

A. CED BACKGROUND AND COMMUNITY DEVELOPMENT EXPERIENCE

The mission of the University of Alaska Center for Economic Development (UACED) is to leverage the university's many resources to facilitate economic development efforts throughout Alaska. The UACED has been providing services to tribes, regional development organizations and other non-profit or public entities throughout Alaska since 1992.

The center has a positive and solid history of providing technical assistance and applied research related to economic development specifically to communities. A partial client list is attached within the appendix of this document. To list a few outcomes specifically, the center has provided advanced technical assistance to an average of 35 clients per year or more than 600 clients since its inception.

B. PROJECT UNDERSTANDING

The City of Homer, Alaska seeks the assistance of an outside organization to provide direction and strategy in the prioritization of existing development plans currently adopted by the City of Homer. The University of Alaska Center for Economic Development has more than two decades of experience partnering closely with Alaskan communities and municipal governments to strengthen community planning and development initiative efforts. The experience includes strategic planning and other forms of facilitation for city governments, chambers of commerce, ARDORs, and Alaska Native Corporations. Prioritization is a critical process which paves the way to effective strategy implementation. The UACED is prepared to assist in the development of a prioritized, strategy implementation plan. Through a facilitated planning session, the UACED will guide discussion in a narrowed, impactful direction, leading towards a clear and narrowed, prioritized implementation plan.

C. REQUEST FOR ASSISTANCE AND SCOPE OF WORK

The purpose of requesting a facilitated planning and prioritization session is to ultimately create a clear and narrowed focus for City projects. This focus centers on the goal of generating an effective impact through efficient and orderly pathways, complementing diverse projects happening simultaneously, and ultimately creating the best version of the community of Homer.

To accomplish these goals, UACED intends to utilize the process of Strategic Doing to generate a clear prioritization of existing plans and focus areas. Additionally, while leading session attendees through the prioritization process, Center staff will also be training City Council and department directors in a process which can be used in the implementation phase of the prioritized projects in a very similar way in which it will be used to identify priorities. Prior to the one-day planning session, Center staff will work with point persons from the City of Homer to ensure that any agenda plans and trainings developed for the session are in accordance with desired outcomes and systems.

During the one-day session, Center staff will guide Council members through the process of meaningfully prioritizing City goals and plans and teach skills which can later be used to continue the ongoing process of reprioritization as plan adaptations need to be addressed. Center staff will deliver a written summary of the prioritization plan which will be developed during the one-day planning session. Center staff will continue to work with appointed persons at the City of Homer on an as-needed basis as plan completion and interpretation occurs.

The University of Alaska Center for Economic Development is pleased to respond to the Request for Strategic Implementation Planning for the City of Homer, Alaska. We believe that we have a team with the necessary expertise to help you accomplish your comprehensive prioritization and implementation planning goals.

We are confident that the experience and skills of the UACED team will provide you with the necessary tools you need to move forward in plan prioritization and strategy implementation.

During an 8 hour session, the UACED team will:

- Initiate prioritization process by categorizing existing plans/projects into the portfolio model of civic innovation;
- Lead a numerical prioritization exercise within one strategic quadrant which will further prioritize specific plans and projects within that quadrant, providing a starting point for all sequential prioritization of plans and projects;
- Introduce Strategic Doing as an effective process to identify, prioritize, and implement projects that align with goals identified in existing plans;
- Utilize the Strategic Doing process to collectively identify pilot projects within the chosen quadrant;
- Guide participants through an engaging and practical training on Strategic Doing as a tool to actively and continually guide ongoing prioritization and strategy implementation initiatives.

Session participants will gain a clear initial implementation plan, and also learn critical skills in a process which will allow them to continue agilely adjusting and updating the plan to fit the ever-changing needs of their community.

Outside of the 8 hour session, The UACED team will:

- Work directly with City point persons to develop agenda for facilitated planning session;
- Provide City Council with a brief, yet comprehensive document which details the specific outcomes of the strategy session and provides a series of recommendations which will guide the continued implementation process with the goal of a desired 5-year action plan in mind;
- Clearly outline Strategic Doing action plan which can be implemented immediately and continued indefinitely;
- Work directly with City point persons to ensure thorough understanding and interpretation of all goals and strategies;
- Work directly with City point persons to determine if additional strategy session is needed;
- Offer additional direct support on an as-needed basis during initial plan implementation period.

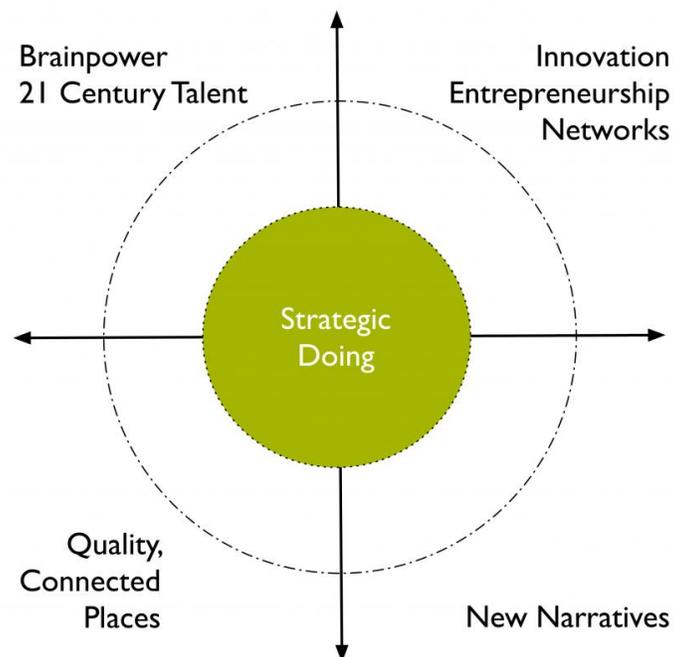
D. WORK PLAN

We believe UACED is ideally suited to assist with this challenging assignment. In addition to our understanding of the critical local issues that Alaskan communities face, we have the necessary planning, training, and implementation skills for the needed scope of services. In particular, the UACED team includes the only individuals in the state of Alaska who are certified in the innovative strategy implementation process known as Strategic Doing. We believe that Strategic Doing will be the most effective and agile approach to not only prioritize existing City plans, but to also provide a structure through which ongoing plans and projects can be effectively implemented. We look forward to working with the City of Homer on this very important planning initiative.

MAP PLANS AND PROJECTS INTO THE PORTFOLIO MODEL OF CIVIC INNOVATION

Prioritization can often be viewed as an overwhelming task. With so many options and avenues to choose from, how is one to know where to begin in prioritizing those plans, let alone actually get started on implementation? The first step to successful prioritization is categorization. Developed by Ed Morrison, Strategic Doing utilizes the portfolio model of civic innovation to categorize community goals and initiatives (see Figure 1 below). By sorting plans into the appropriate quadrants of the portfolio model, with the guidance of UACED staff, the City will begin to assess which area of development is initially most critical to initial and long-term successes.

Figure 1) Portfolio Model of Civic Innovation



Each quadrant of the portfolio model of civic innovation contributes to creating a thriving community. **Brainpower/21st Century Talent** includes plans and focus areas which contribute to recruiting and retaining community members who will lead and guide the community through the rapid changes that technology consistently creates. The **Innovation/Entrepreneurship Networks** quadrant houses plans which address the need to support local businesses and foster potential for increased innovation. In a rapidly-changing world, those who do those who do not innovate do not lead, and those who do not adapt disappear. In order to attract and retain innovators and 21st century talent, deliberate attention must be put into creating a community in which these individuals will want to live. The **Quality, Connected Places** quadrant includes the focus areas which center around community beautification and many other projects which create an atmosphere in which today's innovators and tomorrow's leaders will want to spend their time and energies. Finally, the **New Narratives** quadrant addresses those projects and plans which focus on how Homer is and could be perceived by both its residents as well as outsiders. What people say when they talk about Homer matters, and diverse City plans and projects can contribute to and shape that conversation.

During the planning session, UACED staff will thoroughly introduce attendees to the portfolio model of civic innovation and guide the process of sorting existing plans and/or projects into their respective quadrants. Through this exercise, City Council will discover which development sectors are most heavily weighted and from there decide where to begin in the prioritization process. While each quadrant holds equal value and importance in a strategic community development plan, for the purpose of this exercise, one quadrant will be identified as the most critical to initial success and be focused on more in depth for the duration of the exercise. The selection of this quadrant may quickly lead to an obvious focus area or may result in a lengthier, active discussion to reach an agreed upon decision. UACED staff will guide attendees through the selection process and offer insight into narrowing focuses and identifying starting points.

NUMERICAL PRIORITIZATION EXERCISE

Once a quadrant is identified as the collectively-selected area of focus, conversation will shift towards actual plans and projects categorized in that area. Center staff will guide conversations around ranking plans and projects in the chosen quadrant. A numerical prioritization exercise will be utilized to accomplish this purpose. Through structured and meaningful group discussion, plans and projects will be ranked according to strategies introduced by UACED staff.

Through the numerical prioritization exercise, attendees will learn the necessary skills to prioritize not only the plans and projects in the identified quadrant, but will also learn how to apply those skills to the prioritization plans and projects in the remaining three quadrants. Center staff intends to guide the Council through primary focus area prioritization of each quadrant and project prioritization for the quadrant which is identified as deeming immediate, prioritized action. Through this approach, training will be emphasized to equip attendees with the necessary skills to continue the prioritization process far beyond the plans and projects identified during this planning meeting.

With the primary focus area/quadrant thoughtfully identified and plans/projects within that quadrant meaningfully prioritized, City Council will have a clear and impactful platform from which to launch a strategy implementation process. If City Council requests further guidance and direct

assistance in any remaining prioritization projects, UACED is happy to explore additional partnership opportunities.

Because one quadrant alone does not hold the solution to a community’s development needs, plans from multiple quadrants may be identified to be implemented simultaneously in different focus areas of a comprehensive implementation strategy. Bearing this strong possibility in mind, Center staff will make recommendations to City Council on how an implementation strategy will address multiple focus areas and pilot projects through networks and community participation.

STRATEGY IMPLEMENTATION

Strategic plans offer meaningful guidelines and projections through which community strategy can be first approached. However, strategic plans alone do not offer a practical solution to community development. Without implementation, a plan, no matter how strategic, will not bear fruit and create meaningful development. For strategy implementation to actively be carried out, what is needed is not a *plan*, but rather a *process*. To equip City Council with the necessary skills to carry out strategy implementation, Center staff will introduce attendees to Strategic Doing.

Through the Strategic Doing process, attendees will learn how to address the rapid changes of our quickly progressing world by utilizing agile and effective implementation strategy. Just as multiple plans and projects must be prioritized, so too must one give weighted value to pilot projects and learn how to fail quickly and learn from those failures so as to adapt and continue to move forward towards new successes.

The traditional strategic planning method employs a rigid, linear structure of planning and implementation (see Figure 2 below). Planners spend a great deal of time building intricate and thorough plans. Once the plan is complete, there is typically a short burst of energy and action centered on plan implementation. However, due to a number of uncontrollable outside factors including changing economies, changing technologies, changing leadership, lack of implementation infrastructure, procedure, or personnel support, the plan is typically only relevant and used for implementation for a short time period.

Figure 2) Planning and implementation cycle of traditional strategic planning

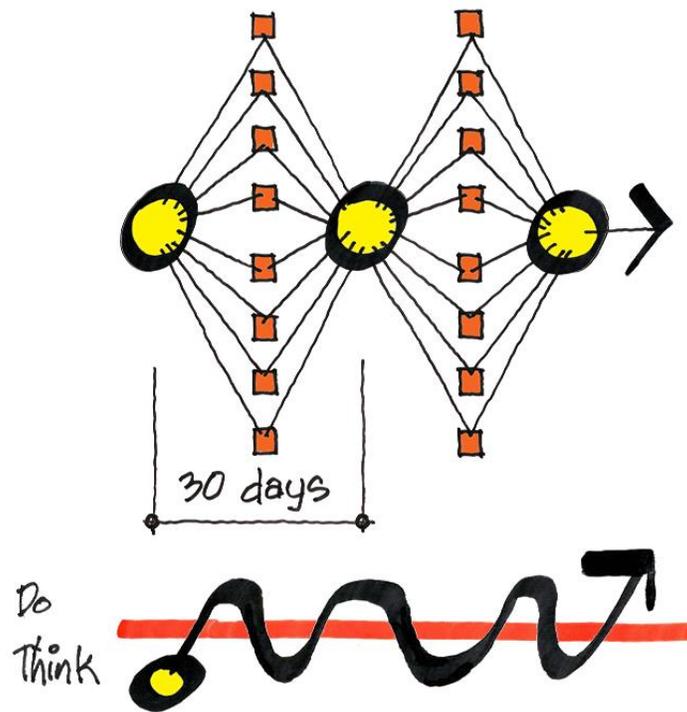


Strategic Doing © 2012 - Purdue Center for Regional Development

Strategic Doing, however, addresses planning and implementation in a unique and agile way (see Figure 3 below). Strategic Doing centers on a constant cycle of planning and implementation. This cycle is driven by a constant re-grouping of strategy implementers and collaborators as strategy is continually adjusted to allow for the un-ignorable outside changes that our world produces at a rapid

pace. When a group comes together frequently between regular and scheduled intervals, continuous strategizing and quick, agile adaptation can occur. When a group comes together to collaborate they are creating strategy and action plans. During the intervals in between meeting with the group, they are implementing that strategy utilizing that action plan. In this process, those responsible for strategy implementation are working within a structured, but flexible, process which allows them to act agilely and deliberately, continuously learning and adapting their plans to best fit the new challenges and uncontrollable changes that come their way.

Figure 3) Planning and implementation cycle of Strategic Doing



Strategic Doing © 2012 - Purdue Center for Regional Development

Strategic Doing equips practitioners with a process that focuses on action-oriented conversations and goals to progress projects forward. Through Strategic Doing, practitioners will move in the direction of their conversations and achieve tangible success.

E. BUDGET – CONTRACT RATE

CED Professional Support (approximately 65 hours for preparation, facilitation, and write-up of final plan) \$3,940

Travel to Homer for one facilitated session (two staff) \$1,160

Total Project Cost \$5,100

Appendices

Key Project Team Members

Melissa Houston, Certified Strategic Doing Guide

Ms. Melissa Houston, Certified Strategic Doing Guide, trained directly under Ed Morrison, the creator of Strategic Doing. Ms. Houston has devoted the past 18 months to learning from and working closely with other Strategic Doing practitioners within the Purdue Center for Regional Development. Ms. Houston has dynamic experience in introducing and leading diverse groups from across Alaska in the process of Strategic Doing. She has worked directly and extensively with communities on the Kenai Peninsula, including the city of Seward and the city of Soldonta. Both communities are currently engaged in Strategic Doing initiatives and generating meaningful and identifiable successes as they continue to move forward in identifying and achieving their community development goals. Ms. Houston holds a Bachelor's degree from Loyola University Chicago.

Nolan Klouda, Interim Director

Mr. Nolan Klouda is the Interim Director of the UACED. In this capacity, he manages a variety of technical assistance projects related to business planning, feasibility analysis, marketing development, business retention and expansion, and other economic development initiatives. He has successfully engaged and worked with tribal governments, municipal governments, non-profits, Alaska Native Corporations, and private business groups to assist them in realizing their strategic goals. His core areas of expertise include economic feasibility, program design and implementation, rural economic development, and engagement between the public and private sectors. Mr. Klouda holds a Master of Public Administration from the University of Kansas and a Bachelor's degree from Gustavus Adolphus College. In addition to education, he brings seven years of organizational leadership and development (including business and management consulting) experience to the UACED.

UA, Center for Economic Development – Partial Client List.

Client/Community/Entity	Project
Feasibility Studies/ Business Plans	
State of Alaska	South Denali Visitor Center Feasibility Study
State of Alaska	South Denali Campground Business Plan
Shishmaref Native Corporation	Nome Hotel Feasibility Study
Ouzinkie Native Corporation	Ouzinkie Wilderness Lodge Feasibility Study
Ahtna Incorporated	Copper Center Machine Shop Feasibility Study
Chickaloon Village Traditional Council	Moose Creek Campground Business Plan
City of Seldovia	Multi-Use Facility Feasibility Study
Kenaitze Indian Tribe	Kenaitze Transportation Feasibility Analysis
Camp Fire Alaska	After School Program Market Analysis
Cordova Community Kitchen	Cordova Community Kitchen Feasibility Study
Project & Community Planning	
Alaska Peony Growers Association	Project Planning Assistance
Arctic Slope Regional Corporation	Tourism Development Plan
Arctic Development Council	Community Economic Development Strategy
Kodiak – St. Mary’s School	Management and Operations Mentoring
State of Alaska, DCCD	Organizational Strategic Planning
Fairbanks Community Cooperative Market	Cooperative Formation and Planning
POW Bio-Fuel Cooperative	Cooperative Formation and Planning
Alaska Peninsula Corporation	Economic Assessment and Planning
Workshop/Training/Conference	
City of Seward	BRE and Strategic Doing Facilitation
City of Soldotna	BRE and Strategic Doing Facilitation
Statewide	Economic Developer Practitioner’s Training
Kawerak and EDA	Management Development Training – Nome
Norton Sound/Western Alaska	Multiple Development Trainings and Workshops
Petersburg	Project Planning and Development Training
Research/Information Dissemination	
Alaska Business Monthly Magazine	Alaska Trends – Research, Report & Publish
Alaska Native Heritage Center	Research/Develop Business Start-up Guides
Institute for Social and Economic Research	Viable Business Enterprises in Rural Alaska
NANA Regional Incorporated	Northwest Alaska Retail Market Analysis